

## DEPARTMENT OF SOCIAL SERVICES

744 P Street, Sacramento, CA 95814



January 14, 1998

ALL-COUNTY LETTER NO. 98-05

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 1998 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, 1998 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 2.1 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 1998 SOC. (Example: the benefit amount is \$438.00, multiplying by 1.021 equals \$447.20; rounding down to the nearest dollar equals \$447.00.)

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. Pursuant to Welfare and Institutions Code Sections 12201(d)(1) and 12201.03(a), there will be no 1998 SSP COLA, but there will be a pass-through of the federal 2.1 percent SSI COLA. As a result, most combined SSI/SSP benefit levels will increase effective January 1, 1998.
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 D and E).

3. With the increase in SSI/SSP benefit levels, some IHSS status-eligible recipients will lose their SSI/SSP eligibility effective January 1, 1998, because the RSDI COLA increase will cause their incomes to exceed the new SSI/SSP benefit levels. 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.
4. The CDHS will place these recipients in Pickle Aid Codes - 16, 26, or 66 - on MEDS at least until April 30, 1998, or until their eligibility status is determined. We will make a county listing, with the Personal Care Services Program (PCSP) identifiers, available to you as soon as they are completed. County Medi-Cal staff will be sent copies of the listing and will be responsible for making the Pickle determinations on these cases.
5. Recipients who are PCSP-eligible should remain in IHSS Aid Codes 10, 20 or 60 as status-eligible cases until their Pickle Aid Codes can be entered in CMIPS. This aid code conversion will be done automatically in CMIPS. Counties should not have to take any action for this group, other than working possible exceptions to the conversion.
6. Individuals who lose their SSI eligibility January 1, 1998, and are NOT PCSP-eligible, will have a new SOC effective January 1, 1998, based on their appropriate SSI/SSP benefit level table. Counties must contact these recipients and develop their income-eligibility. The Pickle indicator will be entered by CMIPS in the D3 field of the SOC 293 for these cases.

C. Share of Cost Cases

1. The SOC is calculated based on two different SSI/SSP benefit level tables, "N" and "C". Columns "Y," "Z," "A," and "B" were eliminated because the benefit levels were less than column "C", which is based on the January 1998 rates (Attachment B).
  - The rates in column "N" are used for individuals who have been income-eligible for IHSS prior to September 1, 1993
  - The rates in column "C" apply to all income-eligible recipients who became eligible on, or after, September 1, 1993
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, 1998, because of RSDI increases and/or SSI/SSP benefit level changes. However, any case with an end date in Field ZZ4 of December 31, 1997, or earlier, cannot be automated. Each time

there is an automated procedure in CMIPS, some cases are excluded and are printed on an exception list. Typically, the exception is due to an overdue reassessment.

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 1998 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 12, 1997, so that we can meet the timelines for the NOAs. Any changes or new cases added to CMIPS after December 12, 1997, should use the following procedure so correct segments can be built on the SOC 293 M, N, and O lines:

- Turnaround Document (TAD) #1:

Enter appropriate data for 1997 SOC fields and wait for the next TAD to enter 1998 data. A NOA will be generated containing the usual SOC message(s).

- TAD #2:

Enter 01/01/98 in SOC Field I1. Enter corrected RSDI income in Source/Income Field - I4, J1, J2, K1 or K2 (1.021 x 1997 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 1998." 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. The TADs will also be generated on the cases where the aid code is automatically converted to a Pickle aid code (see section B.3 on page 3).
3. 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 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). This information has been incorporated into the CMIPS User's Manual.

1. SOC 294A (Attachment D):

Change allowance in Column B, Row 2A to \$247.00, and change allowances in Column B, Row 6 to \$247.00.

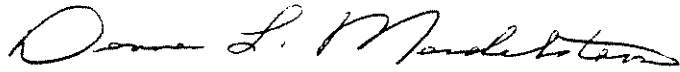
2. SOC 294C (Attachment E):

Change allowances in Column A, Row 2A to 247, and change allowances in Column A, Row 14 to (1) \$494.00 and (2) \$741.00.

G. Attachments

1. Attachment A is the SSI/SSP Payment Standards, effective January 1, 1998.
2. Attachment B is the SSI/SSP Benefit Level Tables for determining IHSS share of cost, effective January 1, 1998.
3. Attachment C is a copy of the revised pages for the IHSS/CMIPS User's Manual pages V-A-15 through V-A-20.
4. Attachment D - Form SOC 294A (IHSS Income Eligibility - Adult).
5. Attachment E - SOC 294C (IHSS Income Eligibility - Child).

For questions regarding CMIPS procedures, please call Josie Powers at (916) 229-4019; policy questions should be directed to your policy analyst.



DONNA L. MANDELSTAM

Deputy Director

Disability and Adult Programs Division

c: CWDA

Attachments

# ATTACHEMENT A

## ESTIMATED SSI/SSP PAYMENT STANDARDS EFFECTIVE JANUARY 1, 1998

CNI - AB 67 Suspended the SSP COLA;

CPI - Includes the pass-through of the 1/98 SSI COLA

CNI: 2.60% (a)  
CPI: 2.10% (a)

	INDEPENDENT LIVING			REDUCED NEEDS			NON-MEDICAL OUT-OF-HOME CARE 1/ (NMOHC)					
	RESIDING IN OWN HOUSEHOLD			HOUSEHOLD OF ANOTHER WITH IN-KIND ROOM & BOARD			HOUSEHOLD OF RELATIVE WITH IN-KIND ROOM & BOARD			IN LICENSED FACILITY OR HOUSEHOLD OR RELATIVE WITHOUT IN-KIND ROOM & BOARD		
	Total	SSI	SSP	Total	SSI	SSP	Total	SSI	SSP	Total	SSI	SSP
<b>INDIVIDUAL:</b>												
AGED OR DISABLED - without cooking facilities (RMA) 2/	650.40 718.40	494.00 494.00	156.40 224.40	497.80 N/A	329.34 N/A	168.46 N/A	638.34 N/A	329.34 N/A	309.00 N/A	796.00 N/A	494.00 N/A	302.00 N/A
BLIND	705.40	494.00	211.40	563.40	329.34	234.06	638.34	329.34	309.00	796.00	494.00	302.00
DISABLED MINOR - living with parent(s) - living with non-parent relative or non-relative guardian	557.40	494.00	63.40	396.17	329.34	66.83	638.34	329.34	309.00	796.00	494.00	302.00
<b>COUPLE:</b>												
AGED OR DISABLED - per couple - without cooking facilities (RMA) 2/	1,155.71 1,291.71	741.00 741.00	414.71 550.71	946.02 N/A	494.00 N/A	452.02 N/A	1,312.33 N/A	494.00 N/A	818.33 N/A	1,592.00 N/A	741.00 N/A	851.00 N/A
BLIND - per couple	1,339.18	741.00	598.18	1,129.49	494.00	635.49	1,312.33	494.00	818.33	1,592.00	741.00	851.00
BLIND/AGED OR DISABLED - per couple	1,270.73	741.00	529.73	1,061.05	494.00	567.05	1,312.33	494.00	818.33	1,592.00	741.00	851.00

### TITLE XIX MEDICAL FACILITY

Total.....\$42  
Individual.....\$84  
Couple.....60  
SSI.....30  
SSP.....12

### 1/ NON-MEDICAL OUT-OF-HOME CARE

Personal and Incidental Needs Maximum: \$164

2/ RMA - Restaurant Meals Allowance

Minimum: \$93



**ATTACHMENT B**

**IHSS Share Of Cost  
January 1998 SSI/SSP Benefit Level Table**

		<i>SOC 293 Field II Benefit Levels</i>	
<i>Benefit Code</i>	<i>Description</i>	<i>N</i>	<i>C</i>
01	Ind. Aged or Disabled - Own Home	650.40	650.40
02	Ind. Blind - Own Home	705.40	705.40
03	Ind. Disabled Minor - Own Home	557.40	557.40
04	Ind. Aged or Disabled - Household of Another	497.80	497.80
05	Ind. Blind - Household of Another	563.40	563.40
06	Ind. Disabled Minor - Household of Another	396.17	396.17
07	Ind. Aged or Disabled W/O Cooking Facilities	718.40	718.40
08	Couple Aged or Disabled - Own Home	1155.71	1155.71
09	Couple Blind - Own Home	1339.18	1339.18
10	Couple Blind/Aged or Disabled - Own Home	1270.73	1270.73
11	Couple Aged or Disabled - Household of Another	946.02	946.02
12	Couple Blind - Household of Another	1137.67	1129.49
13	Couple Blind/Aged or Disabled - Household of Another	1065.67	1061.05
14	Couple Aged or Disabled - Independent Living W/O Cooking Facilities	1291.71	1291.71
15	Couple Aged or Disabled Own Home, Per Person	577.86	577.86
16	Couple Blind - Own Home, Per Person	669.59	669.59
17	Couple Blind/Aged or Disabled - Own Home, Per Person	635.37	635.37
18	Couple Aged or Disabled - W/O Cooking Facilities, Per Person	645.86	645.86
19	Couple Aged or Disabled - Household of Another, Per Person	473.01	473.01
20	Couple Blind Household of Another, Per Person	568.83	564.75
21	Couple Blind/Aged or Disabled - Household of Another, Per Person	532.84	530.53

**N** = Recipients who have been continuously income-eligible for IHSS prior to 9/1/93.

**C** = All income eligible recipients who became eligible for IHSS on or after September 1, 1993. (The other codes - Y, Z, A and B - were eliminated because the benefit levels were less than "C" column which is based on the January 1998 rates.)

- 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, add one of the following codes which indicates the IHSS share of cost benefit level that applies to a recipient. Refer to the IHSS Share Of Cost January 1998 SSI/SSP Benefit Level Table for the specific data.

- N - Recipients who have been continuously income-eligible for IHSS since prior to September 1, 1993.
- C - All income eligible recipients that became eligible for IHSS on or after September 1, 1993. (The other codes - Y, Z, A, and B - were eliminated because the benefit levels are no longer applicabe.)

- 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
\$247.00	Needs of children/non-linked spouse
\$494.00 or \$741.00	Allowance for parrrnt(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	\$ 650.40
02 - Individual blind, own home	705.40
03 - Individual disabled minor, own home	557.40
04 - Individual aged or disabled, household of another	497.80
05 - Individual blind, household of another	563.40
06 - Individual disabled minor, household of another	396.17
07 - Individual aged or disabled, independent, living without cooking facilities	718.40
08 - Couple aged or disabled, own home	1,155.71
09 - Couple both blind, own home	1,339.18
10 - Couple blind/aged or disabled, own home	1,270.73
11 - Couple aged or disabled, household of another	946.02
12 - Couple both blind, household of another	1,129.49
13 - Couple blind/aged or disabled, household of another	1,061.05
14 - Couple aged or disabled, independent, living without cooking facilities	1,291.71

- 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	\$ 577.86
16 - Couple both blind - own home, per person	669.59
17 - Couple blind/aged or disabled - own home, per person	635.37
18 - Couple aged or disabled - without cooking facilities, per person	645.86
19 - Couple aged or disabled - household of another, per person	473.01
20 - Couple blind - household of another, per person	564.75
21 - Couple blind, aged or disabled - household of another, per person	530.53

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.
- Based on the entries in Fields I5, COUNTABLE INCOME, and J3, BENEFIT CODE/LEVEL, this field will be system-generated and will plug the share of cost into the eligibility segments, Fields M6, N6, and O6, where applicable.

Field L1,  
 L2: MODE/RATE/HOURS - Required, Alphanumeric  
 Length: 2, 4, 4 - Format: XX, XX.XX, XXX.X  
 Description: Mode/Rate/Hours - Indicates service delivery mode, provider's pay rate, and authorized hours of service for the recipient.

Delivery Mode - Code indicates the type of service delivery of IHSS.

IP - Individual Provider

CC - County contract, either private vendor or inter-agency agreement

HM - County-employed homemaker

Hourly Rate of Pay - The rate of pay per authorized service hour for the type of delivery mode.

- If this amount is not entered for individual providers, the system will default to the current county rate.
- If this amount is not entered for contract or county homemaker providers, the system will default to the contract or homemaker base rate.

Hours of Service by Delivery Mode - The hours of authorized service will be system-generated unless there is a mixed mode service delivery.

- If there are two IP modes with different hourly rates, enter IP twice, the hourly rate and the hours of authorized service for one of them. The balance of the hours will be system-generated.
- If there is a mixed mode of service delivery, enter both modes, the hourly rate for each (unless one or both are at the county base rate) and the hours of authorized service for one of them. The balance of the hours will be system-generated.

Refer to Section V-B, Special Instructions: Changing Service Delivery Mode, Rate and Hours - SOC 293.

Field L3:	RECOVERY - System Generated, Numeric
Length	6 - Format: \$X,XXX.XX
Description	Recovery - Indicates a monthly amount being recovered from a recipient for a prior overpayment. This field will be system-generated based on information entered from the SOC 330 IHSS Collection Transaction form(S). The total of all SOC 330 original overpayment amounts where the collection has an outstanding balance due will be displayed.

The next three lines are monthly payment segments and are used when building or updating a recipient's payment eligibility period. The following explanation (M1 through M8) will include all three eligibility segments (M, N, and O). All fields in these

**IHSS INCOME ELIGIBILITY — ADULT**

Name \_\_\_\_\_ Case No. \_\_\_\_\_ Month \_\_\_\_\_

**RECIPIENT**

**SPOUSE**

A. Income of aged, blind or disabled individual or couple (if individual has spouse not aged, blind or disabled, also complete Part B)

B. Income of aged, blind or disabled individual and spouse who is not aged, blind or disabled.

		UNEARNED	EARNED			UNEARNED	EARNED
1. Unearned income (list) (Do not show exempt income)				1. Income of client's spouse*		\$	\$
a.	\$			2. Allowance for children not blind or disabled.			
b.	\$			a. Children's needs			
c.	\$			b. Children's income*	\$	\$	\$
2. Total unearned income (A1a to A1c)	\$			c. Net needs (a — b)	\$	\$	\$
3. Any income exclusion	\$20			d. Total allowance (add B2c's)		\$	
4. Net unearned income (A2 minus A3)	\$			3. Remaining unearned income (B1 minus B2d)		\$	
5. Earned income (Do not show exempt income)		\$		4. Unmet children's needs (If B2d is greater than B1 unearned, enter the difference)			\$
6. Unused \$20 exclusion (If A3 is greater than A2, enter the difference)			\$	5. Remaining earned income (B1 minus B4)			\$
7. Earned income exclusion			\$65	6. Net income of spouse (B3 plus B5) — If equal to or less than A15 is entered in C  — If greater than complete B7 through B20			\$
8. Total exclusions (A6 plus A7)			\$	7. IHSS client's income (From A2 and A5)		\$	\$
9. Remaining earned income (A5 minus A8)			\$	8. Income of couple (B3 plus B7 unearned, B5 plus B7 earned)		\$	\$
10. Net earned income (A9 x ½)			\$	9. Any income exclusion		\$20	
11. Other earned income deductions			\$	10. Net unearned income (B8 minus B9)		\$	
12. Total net earned income (A10 minus A11)			\$	11. Unused \$20 exclusion (If B9 is greater than B8 unearned, enter the difference)			\$
13. Total countable income (A4 plus A12)			\$	12. Earned income exclusion			\$65
14. SSI/SSP payment level			\$	13. Total exclusions (B11 plus B12)			\$
15. IHSS share of cost (A13 minus A14)			\$	14. Remaining earned income (B8 minus B13)			\$
				15. Net earned income (B14 x ½)			\$
				16. Other earned income deductions			\$
				17. Total net earned income (B15 minus B16)			\$
				18. Total countable income (B10 plus B17)		\$	
				19. SSI/SSP couple payment level		\$	
				20. IHSS share of cost (B18 minus B19)		\$	
				<b>C. SHARE OF COST (higher of A15 or B20)**</b>		\$	

\*\* If there is also a blind or disabled child in the family, the share of cost shown in Line C is not paid. Enter this amount on Form SOC 294C, Line A9. The share of cost will be the amount determined in SOC 294C, Line B16.

WORKER

DATE



**IHSS INCOME ELIGIBILITY - CHILD**

NAME				CASE NUMBER		MONTH	
PARENT				RECIPIENT			
A. Income deemed to a blind or disabled child living at home who is under 18.				B. IHSS share of cost computation for blind or disabled child who is under 18.			
<input type="checkbox"/> Income of parent and parent's spouse where neither is aged, blind or disabled.				Unearned	Earned		
				Unearned	Earned		
1.	Gross income			\$	\$	1.	Income deemed to child (from A15 or A16)**
2.	Allowance for children not blind or disabled						\$
	a. Children's needs					2.	Unearned income (list) (Do not show exempt income)
	b. Children's income	\$	\$	\$		a.	\$
	c. Net needs (a minus b)	\$	\$	\$		b.	\$
	d. Total allowance (add A2c's)	\$				c.	\$
3.	Remaining unearned income (A1 minus A2d)	\$				3.	Total unearned income (B1 plus B2)
4.	Unmet children's needs (If A2d is greater than A1 unearned, enter the difference)				\$	4.	Any income exclusion
5.	Remaining earned income (A1 minus A4)				\$	5.	Net unearned income (B3 minus B4)
6.	Any income exclusion	\$ 20				6.	Earned income (Do not show exempt income)
7.	Net unearned income (A3 minus A6)	\$				7.	Unused \$20 exclusion (If B4 is greater than B3, enter the difference)
8.	Unused \$20 exclusion (If A6 is greater than A3, enter the difference)				\$	8.	Earned income exclusion
9.	Earned income exclusion				\$ 65	9.	Total exclusions (B7 plus B8)
10.	Total exclusions (A8 plus A9)				\$	10.	Remaining earned income (B6 minus B9)
11.	Eamed income (A5 minus A10)				\$	11.	Net earned income (B10 x 1/2)
12.	Net earned income (A11 x 1/2)				\$	12.	Other earned income deductions
13.	Total income (A7 plus A12)	\$				13.	Total net earned income (B11 minus B12)
14.	Allowance for parent and spouse (1) (2)	\$				14.	Total countable income (B5 plus B13)
15.	Income deemed to child (A13 minus A14)	\$				15.	SSI/SSP payment level
<input type="checkbox"/> Income parent(s) where one or both are aged, blind or disabled.						16.	IHSS share of cost (B14 minus B15)
16.	Parent(s) income in excess of SSI/SSP payment level (from SOC 294A C)	\$					\$
WORKER				DATE			

\*\* Note: If more than 1 eligible child, divide deemable income equally among them, except that if one child has excess income, it is deemed to other eligible children.