
BUDGETING FOR AT-HOME ELIGIBILITY
BUDGETING METHODOLOGY

- A. BUDGETING FOR FORMER SSI RECIPIENTS**
- The following budgeting rules are unique to former SSI recipients. In all groups, SSI policy must be used and the appropriate SSI FBR used as the need standard in budgeting. Countable income of the eligible cannot be equal to or exceed the appropriate SSI FBR used.
- 1. SSI Retro**
- If SSI policy is used to determine eligibility for an SSI retro case, then SSI budgeting rules apply:
- the appropriate SSI FBR must be used for each month of retroactive eligibility,
 - countable income cannot be equal to or exceed the SSI FBR
- 2. HR-1**
- In addition to all other appropriate income exclusions, an HR-1 eligible receives an income disregard of the 20% increase in title II benefits received in September, 1972. **All HR-1 cases must be referred to the State Office for review prior to approval.**
- 3. COL**
- In addition to all other appropriate income exclusions, COL eligibles receive a disregard of all Social Security cost-of-living increases received since the client was last eligible for and received SSI and Social Security then lost SSI eligibility. To determine the COL disregard:
- Verify the SSI Termination Date.
 - Determine the aggregate COL disregard amount
 - Divide the current title II benefit amount by the percentage amount of the previous year's COL increase. This will provide the individual's benefit level prior to the COL increase. This computation is then repeated for each title II COL increase received after the individual last lost SSI.

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- Do not round down. Use the actual amount calculated for each preceding year.
 - When the last computation is completed, the result is the title II benefit amount when SSI was terminated. Subtract this amount from the current title II benefit. The difference is the COL disregard amount to be disregarded in budgeting countable income.
 - All possible calculations back to July 1977 are provided in the Appendix "COL Computation History."
 - **All COL applications must be referred to the State Office for review prior to approval. State Office will determine the COL disregard, if needed.**
- 4. COBRA**
Widow(er)s
- This limited group of eligibles were allowed a disregard of the increase in their 12/83 title II benefits to restore Medicaid eligibility for a limited group of widow(er)s who lost SSI eligibility as a result of the 12/83 title II adjustment.
- 5. DAC**
- In addition to all other appropriate income exclusions, DAC's receive a disregard of either the increase in their Disabled Adult (DAC) Child's insurance title II benefits or the full amount of their DAC benefits, whichever caused their SSI eligibility to terminate. **All DAC applications must be sent to the State Office for review prior to approval. State Office will determine the amount of the DAC disregard, if needed.**
- 6. OBRA**
Widow(er)s
- In addition to all other appropriate income exclusions, OBRA Widow(er)s receive a disregard of their title II widow(er) benefits and any other paid title II benefits that resulted in the termination of SSI. **All OBRA Widow(er) applications must be referred to State Office for review and determination of the disregard amount prior to approval.**