



**State of Florida  
Department of Children and Families**

**Rick Scott**  
*Governor*

**Mike Carroll**  
*Secretary*

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**DATE:** June 10, 2016                      **TRANSMITTAL NO.:** P-16-06-0004

**TO:** Economic Self-Sufficiency Operations Managers  
Economic Self-Sufficiency Program Offices

**FROM:** Dianna Laffey, Chief, Program Policy  
Suzanne Poirier, Chief, ESS Project Management  
**(Signatures on File)**

**SUBJECT:** Spousal Impoverishment Standards (SSI-Related Programs)

**EFFECTIVE:** July 1, 2016

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This memorandum provides staff with the new spousal impoverishment standards effective July 1, 2016, used to compute income allowances for community spouses of institutionalized individuals under the Institutional Care Program. The standards also apply under the iBudget, Cystic Fibrosis, Program of All Inclusive Care for the Elderly (PACE) and the Statewide Medicaid Managed Care Long-Term Care Waiver (SMMC-LTC).

Staff must use the new 2016 standards to compute all community spouse allowances in budgets for months effective July 2016 and ongoing. Community spouse allowances for months prior to July 2016 must be calculated using the 2015 standards.

**Spousal Impoverishment Standards**

**Minimum Monthly Maintenance Needs Allowance (MMMNA)**

<u>July 1, 2015</u>	<u>July 1, 2016</u>
\$1991	\$2003

**Excess Shelter Standard**

<u>July 1, 2015</u>	<u>July 1, 2016</u>
\$597	\$601

The maximum monthly community spouse income allowance remains at \$2981.

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Mission: Work in Partnership with Local Communities to Protect the Vulnerable, Promote Strong and Economically Self-Sufficient Families, and Advance Personal and Family Recovery and Resiliency

**FLORIDA Instructions:** The FLORIDA TMEP reference table has been updated to reflect the new standards for cases processed effective July 1, 2016. A mass change will be run for these July changes. FLORIDA notices will be generated if there is a change in the client's patient responsibility or the community spouse's income allowance.

After the mass change is completed a system broadcast message will be posted on FLORIDA. The message will advise staff when the Mass Change Exception report is available. Staff must take appropriate action on cases appearing on the exception report.

If there are any questions, Regional offices may contact Dorthene Baker at [dorthene.baker@myflfamilies.com](mailto:dorthene.baker@myflfamilies.com). If there are any technology or systems questions, please contact Ron Hardcastle at [ron.hardcastle@myflfamilies.com](mailto:ron.hardcastle@myflfamilies.com).

cc: Assistant Secretary for Economic Self-Sufficiency (Jeri Flora-Culley)  
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## SSI-Related Programs - Financial Eligibility Standards: July 2016

		INCOME LIMIT		ASSET LIMIT		DIVERSION/MAINTENANCE NEED STANDARD
Program and Type of Coverage		Individual	Couple	Individual	Couple	
<b>PROGRAMS MANAGED BY SOCIAL SECURITY</b>						
*Supplemental Security Income (SSI) (Cash payment of SSI from SSA; includes Full Medicaid)		\$733 (FBR)	\$1,100 (FBR)	\$2,000	\$3,000	Child Allocation: \$367 (difference between Couple and Single FBR) SGA for DMRT: \$1,090
+ *Low Income Subsidy (LIS) or Extra Help (helps with costs associated with Medicare Prescription Drug Plans. 150% FPL) Automatic with full Medicaid or Medicare Savings Programs (OMB, SLMB, QI1) Income limits change yearly.		\$1,485	\$2,003	\$13,640	\$27,250	Student Earned Income Disregard: \$1,780 per month; \$7,180 annual cap
<b>PROGRAMS FOR PEOPLE 65+ OR DISABLED (Community Medicaid Programs)</b>						
*MEDS-AD Full Community Medicaid (88% FPL)	\$872	\$1,175	\$5,000	\$6,000	ICP, ICP/Hospice, HCBS, SMMC-LTC, and PACE Community Spouse Allowances: Maximum Income Allowance: \$2,981 MMWNA: \$2,003 Excess Shelter: \$601 Family Members Allowance: (MMWNA minus income) divided by 3 Other Dependents: Use CNS chart	
*Medically Needy No Income Limit. Full Community Medicaid when Share of Cost is met.	Subtract \$180 from gross income	Subtract \$241 from gross income	\$5,000	\$6,000	Maximum Resource Allowance: Community Spouse: \$119,220	
<b>PROGRAMS FOR PEOPLE WITH MEDICARE (Medicare Part B Premium \$121.80, Part A free for most)</b>						
*QMB Pays Medicare premium, coinsurance & deductibles only (100% FPL)	\$990	\$1,335	\$7,280	\$10,930	Community Spouse Allowance: Spouse only: use FBR With Dependents (or dependents only): use CNS	
*SLMB Pays Medicare Part B premium only (120% FPL)	\$1,188	\$1,602	\$7,280	\$10,930	Community Spouse Allowance: Spouse only: use FBR With Dependents (or dependents only): use CNS	
*QI1 Pays Medicare Part B premium only (135% FPL)	\$1,337	\$1,803	\$7,280	\$10,930	Community Spouse Allowance: Spouse only: use FBR With Dependents (or dependents only): use CNS	
*W/D (QD/W) Working Disabled Program; only Pays Medicare Part A premium. Must have lost SSDI due to employment (200% FPL)	\$1,980	\$2,670	\$4,000	\$6,000	Community Spouse Allowance: Spouse only: use FBR With Dependents (or dependents only): use CNS	
<b>PROGRAMS BASED ON INSTITUTIONAL POLICY - Possible Patient Responsibility and Income Trust</b>						
Institutional Care (ICP) Pays Nursing Home room, board & care (and Pays Medicare premium, coinsurance & deductibles)	\$2,199	\$4,398	\$2,000 (\$5,000 if MEDS-AD eligible)	\$3,000 (\$6,000 if MEDS-AD eligible)	Individual PNA+ \$105 Couple PNA+ \$210	
Hospice Pays for Hospice services related to terminal illness (and Pays Medicare premium, coinsurance & deductibles)	\$2,199	\$4,398	\$2,000	\$3,000	Individual PNA+ \$105 Couple PNA+ \$210	
HCBS Home and Community Based Services (Waivers) (and Pays Medicare premium, coinsurance & deductibles)	\$2,199	\$4,398	\$2,000	\$3,000	Individual PNA+ \$105 Couple PNA+ \$210	
<b>STATE FUNDED PROGRAMS</b>						
OSS Redesign (Optional State Supplementation) Assists with paying room & board at Adult Living Facilities (ALF) State rate = \$757.40 single / \$1514.80 couple Maximum payment = \$78.40 single / \$156.80 couple	\$811.40	\$1,622.80	\$2,000	\$3,000	Individual PNA+ \$54 Couple PNA+ \$108	
OSS Protected (Optional State Supplementation) Assists with paying room & board at Adult Living Facilities (ALF) State rate = \$918 single / \$1836 couple Maximum payment = \$239 single / \$478 couple	\$918	\$1,836	\$2,000	\$3,000	Individual PNA+ \$54 Couple PNA+ \$108	
HCDA (Home Care For Disabled Adults) Pays small stipend to caregivers of disabled	\$2,199	\$4,398	\$2,000	\$3,000	Individual PNA+ \$105 Couple PNA+ \$210	

\* A \$20 General Income Disregard is granted in these programs. \$20 will be subtracted from the total of all income not based on need before comparing the income to the income limit. In addition \$65 is subtracted from the total of all earned income, and ½ the remainder is subtracted before comparing the income to the income limit.

### Eligibility Standards for SSI-Related Programs – July 2016

Coverage Group	Income Limit	Asset Limit
Supplemental Security Income (SSI) Individual*	\$ 733	\$ 2,000
Supplemental Security Income (SSI) Couple*	\$ 1,100	\$ 3,000
ICP/HCBS/Hospice/HCDA Individual	\$ 2,199	\$ 2,000
ICP/HCBS/Hospice/HCDA Couple	\$ 4,398	\$ 3,000
MEDS-AD/ICP-MEDS/Individual (88% FPL)	\$872	\$ 5,000
MEDS-AD/ICP-MEDS/Couple	\$1,175	\$ 6,000
QMB Individual (100% FPL)	\$ 990	\$ 7,280
QMB Couple	\$ 1,335	\$ 10,930
SLMB Individual (100-120% FPL)	\$ 1,188	\$ 7,280
SLMB Couple	\$ 1,602	\$ 10,930
QI1 Individual (120-135% FPL)	\$ 1,337	\$ 7,280
QI1 Couple	\$ 1,803	\$ 10,930
Working Disabled Individual (200% FPL)	\$ 1,980	\$ 4,000
Working Disabled Couple	\$ 2,670	\$ 6,000
Protected Medicaid	See A-11 and policy in Chapter 2000	
<b>Medicare Part B Premium</b>	\$ 121.80	
<b>Medicare Part A Premium</b>	<b>Number of Qualifying Quarters of Employment</b>	
	Free	40 or more
	\$ 226	30 to 39
	\$ 411	Less than 30
<b>Personal Needs Allowance</b>		
ICP/ICP-MEDS/Hospice (Institution)	\$ 105	
Hospice (Community ) 100% FPL	\$ 990	
PACE/SMMC-LTC/iBudget (resident of assisted living facility )	Facility Room and Board Charge, plus 20% of the FPL (\$198 individual, \$396 couple)	
<b>Spousal Impoverishment</b>		
Minimum Monthly Maintenance Needs Allowance (MMMNA)**	\$ 2,003	
Excess Shelter Standard**	\$ 601	
Maximum Community Spouse Income Allowance (MMMNA plus excess shelter allowance cannot exceed this figure)	\$ 2,981	
Community Spouse Asset Allocation Standard	\$ 119,220	
<b>Home Equity Interest Limit</b>	\$ 552,000	
<b>Student Earned Income Disregard Limit</b>	\$ 1,780 per month	
	\$ 7,180 per calendar year	
<b>Substantial Gainful Activity</b>	\$ 1,130 per month	

\* Eligibility for SSI is determined by the Social Security Administration.

\*\* These standards change effective July 1 of each year in accordance with federal law