

## 2021 Re-Certification Documents

### 1. NOD - 108 CMR 5.01(3) - Required with all existing AND new cases

### 2. Income - 108 CMR 6.01(2) and 108 CMR 4.02(3)

- Current (2021) SSA award letter, VA award letter, Retirement statement(s), Pension statement(s).  
There is a 1.3% CPI overall increase in Federal benefits (SSA, SSI, and SSDI & VA). January – June 2021 benefits must be offset using current 2021 income.
- Any additional documents that show gross income that is from a valid source issued on letterhead. This includes payroll wages, DUA benefits, child support, and or workman's compensation.
- Please note that the documentation must show the gross (before any deductions) income. If the applicant has any imputed income or unauthorized deductions and is not receiving the gross award amount, the gross award amount must still be entered into the calculations.

### 3. Shelter - 108 CMR 5.02(6)

- Mortgage statement, lease/rental agreement, rent receipt, cancelled check, money order.
- VSO prepared landlord statement on community's letterhead.
- Hand written note from applicant/recipient's landlord must include the landlord's contact information: name, address and telephone number.
- 108 CMR 5.02(9) Mortgage free dwelling- Shelter allowance is calculated by adding annual property taxes, fire insurance premiums, water & sewer charges and --reasonable maintenance. (\$1,200.00 per year should be included in the calculation for those recipients who are elderly and or receiving a REBA allowance.)

### 4. Fuel - 108 CMR 5.02(10)

- Verification is not required if recipient owns their home and provides a mortgage statement, proof of mortgage free dwelling expenses or rental/lease agreement that specifies the applicant / recipient is responsible for fuel.
- All other request for fuel must include verification in the form of a utility or oil bill, which lists the name of the recipient and address. The submission must specifically be for heating—oil, propane, gas, or electric bill.

**5. Verification of Assets - with a Bank Account - Bank Statements – 108 CMR 6.02 and 108 CMR 8.01(2)(f)**

- One complete recent bank cycle statement, un-altered bank statement for the month of November and or December 2020 for all accounts including Checking and/or Savings that lists the applicant/recipient as account holder and or signatory.
- ***Three months of complete bank statements are still required for all new applications and with the three year (VS-1) re-certification.***
- On a case by case basis additional months of statements may be requested.

**6. Verification of Assets - without a Bank Account - Direct Express & Electronic Transfer Account - 108 CMR 6.02 and 108 CMR 8.01(2)(f)**

- One complete recent cycle statement for October, November and or December 2020 statements for those recipients who are receiving Federal Retirement, VA, or SSA benefits but do not have a bank account.

**7. Medicare - B, D, C - 108 CMR 5.02(14)**

- Verification of the deduction - could be SSA award letter or other 3rd party document showing that the recipient is enrolled in the medical plan and pays for the premium.
- Effective January, 2021 current(non-penalty) Medicare B Premium will be \$

**8. Medigap - 108 CMR 5.02(15)**

- Verification of monthly bill from provider (i.e. BC/BS, Tufts, and HCHP etc.).

**9. Re-Application - 108 CMR 4.03**

- Re-submit all demographic documents—DD214, marriage, birth and/or death certificates, if applicable.
- Inform the Authorizer where the demographic documents can be located in EDM if they are not in your documentation submission.
- All required and pertinent documents including (NOD, DOR, ATR, ROI Forms, etc.).
- Income and asset documentation.
- Failure to provide the required documents will delay your authorization and reimbursement.—108 CMR 8.01(c).