**2022 Jan-Jun Annual Re-Certification Documents**

**(Draft 11/2021)**

**MAX Limit – Assets: $8,400/$16,600**

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 (2022) SSA award letter, VA award letter, Retirement statement(s), Pension statement(s).

There is a 5.9% COLA overall increase in Federal benefits (SSA, SSI, and SSDI & VA).

January – June 2022 benefits must be offset using current 2022 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.
* **As of January 2022, there is a 5.9% percent Cost-of-Living adjustment (COLA). The new increase must be used to offset all Ch. 115 benefit payments starting January 2022.**
  + If SSA and or VA letters are not available in December, **to calculate benefits for January 2022 ONLY**, you may use the December 2021 monthly income to calculate January’s income. As an example, in 2021 monthly SSA amount was $1,088.

Take $1,088 and multiply by the 5.9% COLA Increase (.059) then add that amount to the 2021 monthly benefit amount.

**{1088 x 0.059 = 64.19}, {1088 + 64.19 = $1,152.19 (2022 New monthly benefit)}.**

**All re-certification documents are required with your request for reimbursement.**

1. **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 for those recipients who are elderly and or receiving a REBA allowance.

1. **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.

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

* One complete, un-altered bank statement for the month of November and or December 2021 for all accounts including Checking and/or Savings that lists the applicant/recipient as account holder and or signatory. Or an Affidavit of No Accounts for those recipients who do not have a bank account.
* If applicable verification of other types of accounts for example **Venmo, PayPal, Bitcoin, Cash apps** etc.
* ***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.

1. **Verification of Assets - without a Bank Account - Direct Express, Prepaid Debit Cards, Spending Accounts,** **& 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 2021 statements for those recipients who are receiving Federal Retirement, VA, or SSA benefits but do not have a bank account.

# Medical Health Insurance

**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 2022 current (non-penalty) **Medicare B Premium will be** **$170.10**

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

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

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

* Re-submit all demographic documents—DD214, marriage, birth and/or death certificates, if applicable.
* All required and pertinent documents including (NOD, DOR, ATR, ROI Forms, etc.).
* Income and asset documentation.
* **All Recert docs can be imported/uploaded as one file: DVS-MIS –> Document type –> DVS – Re-cert Packet \*\*for 3yr, in addition to Recert docs; new VS-1 must be completed. 108 CMR 4.03(3)(a).**

**Only VS-1 last signed/initial page uploaded.**

* Failure to provide the required documents will delay your authorization and reimbursement. —108 CMR 8.01(c).