

2023 Jan-Jun Annual Re-Certification Requirements

MAX Limit – Assets: \$8,400/\$16,600

Effective January 1, 2023, **to mitigate the impact of the significant Federal COLA increase on Chapter 115 recipient's payments**, benefits must be calculated and offset with the current (December) 2022 income amounts **unless there is change in the recipient's circumstances**.

The 2023 COLA increase of federal benefits (SSA, SSI, and SSDI, VA, and or federal pension) **Will NOT be used to offset January – June 2023 benefits level**. All other income which includes but is not limited to payroll wages, pensions, retirements, DUA- unemployment benefits, child support, and or workman's compensation that are not impacted by the federal COLA increase will be calculated normally.

Although the annual recertification has been changed to July 1, 2022, DVS strongly recommends that you procure and forward all update documents with your January- June request for reimbursement

- 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 (2023) SSA award letter, VA award letter, Retirement statement(s), Pension statement(s).
 - Any additional documents that show gross income is from a valid source issued on letterhead. This includes payroll wages, DUA benefits, child support, and or workman's compensation. The documentation must show the gross income (before any deductions).
 - 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.
 - Medicare B, C, D and Medigap premiums must be submitted at the new 2023 amounts.
- 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.
 - Handwritten note from applicant or 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 (\$100.00 monthly) for those recipients who are elderly and or receiving a REBA allowance.
- 4. Fuel - 108 CMR 5.02(10)**

- If a recipient provides a copy of a rental/lease agreement that specifies the applicant or recipient is responsible for fuel, or owns their home and provides a mortgage statement, or proof of mortgage free dwelling homeowners expenses on a case-by-case basis verification of payment may be requested.
- 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, un-altered bank statement for the month of November and or December 2022 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.
- ***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, 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 2022 statements for those recipients who are receiving Federal Retirement, VA, or SSA benefits but do not have a bank account.

7. 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 2023 current (non-penalty) **Medicare B Premium**

Medigap - 108 CMR 5.02(15)

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

8. Re-Application - 108 CMR 4.03

- Re-submit all demographic documents—DD214, and marriage, birth and or death certificates, if applicable.
- All required and pertinent documents including income, assets (NOD, DOR, ATR, ROI Forms, etc.).
- **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 Pg.5 VS-1 with signature and initial uploaded.**
- Failure to provide the required documents will delay your authorization and reimbursement. —108 CMR 8.01(c).