

## **REVENUE/TRUST SSI/SSA RATE CHANGE**

### Overview:

Currently at the beginning of each calendar year, the Social Security Administration will increase the amount of the Social Security (SSA) benefit by a specific percentage. At the same time, the Supplemental Security Income (SSI) may also increase by a specific dollar amount and is dependent on the type of living arrangements for eligible individuals.

Each year, the Department will issue a Technical Bulletin which will include the SSA percentage increase and the SSI increase. This Technical Bulletin will contain specific instructions and examples to assist regional center staff.

Be aware that because the Social Security Administration retains the exact dollar and cents benefit amount in their data base, but regional center Source of Fund records only has the even dollar benefit amount, there will be instances when the SSI/SSA Rate Change Procedure will calculate a new benefit amount for clients receiving SSA that will either be one dollar more or less than the actual amount the client receives beginning January 1. Neither UFS nor the Department has any control over this situation.

### Procedure:

The specific instructions included in the Technical Bulletin will not be included in this manual, however, other guidelines/suggestions are discussed below:

### Guidelines/Suggestions:

1. The procedure should be run after the December Turnaround Invoices and prior to January Recurring Receivables and Cash Receipts.
2. Before entering parameters for the SSI/SSA Rate Change Procedure, regional center staff should update the Service Rate Table for any rate records which will have a change in the current rate (i.e. P&I and/or Level 1 CCF). Be sure to enter a >Y= in the field for retro-rate change. Afterwards run the >Retroactive Vendor Rate Change= Procedure found on Menu PSMEN6, option #1.

By updating the applicable service rate record(s) and completing the Retroactive Vendor Rate Change procedure, the Negative State Claim Report should have very few, if any entries.

3. The Technical Bulletin instructs regional center staff to generate several reports. The purpose is to identify >homogeneous groupings= for subsequent parameter entries and also to identify authorization balances that may need maintenance prior to running the SSI/SSA Rate Change Procedure. Once again any maintenance that can be completed prior to running the procedure will result in a reduced workload impact afterwards. A portion of the maintenance will be to insure that the clients= source of funds (SOF) are

**REVENUE/TRUST  
SSI/SSA RATE CHANGE**

whole= so that homogeneous groups= can be identified and parameters established.

4. Homogeneous groupings= are to include instances whether the regional center is representative payee or not. Examples of groupings are as follows:

a. Regional center is representative payee and client receives SSI only.

Total old limit is: \$847.00 (B&C - \$749.00 and P&I - \$98.00)

Total new limit is: \$873.00 (B&C - \$771.00 and P&I - \$101.00)

b. Regional center is not representative payee.

Total old limit is: \$749.00 (B&C - \$749.00 and P&I - \$0.00)

Total new limit is: \$771.00 (B&C - \$771.00 and P&I - \$0.00)

**REVENUE/TRUST  
SSI/SSA RATE CHANGE**

COMMAND

MENU: PSME62

W8

\*\*\*\*\* UNIFORM FISCAL SYSTEM \*\*\*\*\*

SERVICES - SSI/SSA RATE CHANGE

1. AUTH BY G.L. ACCOUNTS LISTING
2. CLIENT SOF'S - SOF FILE LISTING
3. SOF COMPARED TO AUTH LISTING
4. AUTHORIZATIONS WITH NEGATIVE CLAIM LISTING

10. SSI/SSA CHANGE PROCEDURE
24. SIGN OFF

Ready for option number or command  
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**REVENUE/TRUST  
SSI/SSA RATE CHANGE**

COMMAND

MENU: PSMEN6

W8

\*\*\*\*\* UNIFORM FISCAL SYSTEM \*\*\*\*\*

SERVICES - SYSTEM FUNCTIONS

1. **PROCESS RETROACTIVE VENDOR RATE CHANGES**
2. SSI/SSA RATE CHANGE MENU
3. RELIEVE ENCUMBERED AUTHORIZATIONS
4. RELIEVE COMMITTED SOF'S

6. PURGE VENDORS

24. SIGN OFF

Ready for option number or command

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