



INLAND REGIONAL CENTER

...valuing independence, inclusion and empowerment

674 Brier Drive, San Bernardino, CA 92408

P.O. Box 6127, San Bernardino, CA 92412-6127

Telephone: 909-890-3000

Fax: 909-890-3001

CONSUMER BENEFITS REMINDER

Most, if not all, of the Inland Regional Center consumers residing in residential care are eligible for Supplemental Security Income (SSI) benefits. Each person who is receiving SSI is also eligible for SSI Medi-Cal. There are resource limit requirements which each SSI recipient must meet in order to continue receiving SSI benefits.

The Social Security Administration established resource limits for SSI recipients (currently, the resource limit is \$2,000.00 and includes all liquid resources). An SSI recipient is considered to be “over the resource limit” if he or she exceeds the resource limit in any given month. Examples of resources include consumer bank accounts, consumer trust accounts, consumer funds conserved by the payee or representative payee, consumer funds held at the facility, consumer personal and incidental funds (P&I) held at the facility, and any other liquid resources. If an SSI recipient exceeds their resource limit, they will not be eligible for benefits that month. In addition to the loss of benefits, the Social Security Administration may determine that the recipient has been overpaid, and will demand repayment. At time of “redetermination”, a consumer may lose his/her benefits (including Medi-Cal) altogether if the consumer’s resources exceed the established limit.

Given the stringent guidelines in place by the Social Security Administration, it is critical that consumer resources never exceed the established resource limit. Thus, residential service providers are responsible for reporting consumer assets to the Consumer Services Coordinator on at least a quarterly basis, and at any point in time that assets exceed \$300.00. The Consumer Services Coordinator is then able to work in collaboration with the Resource Unit to ensure that the consumer’s benefits are not in jeopardy, or to take the necessary steps to remedy the risk of loss of benefits. Please remember to address your residents’ balances on an ongoing basis in order to avoid the risk of losing needed benefits.

When it has been determined that the consumer’s balance is at risk of exceeding the resource limit, the Consumer Services Coordinator is asked to assist the consumer is spending the “uncommitted funds” to remedy the situation. Consumer Services Coordinators then complete the necessary paperwork, to include itemized receipts to release the consumer funds. Payments are made on a bi-monthly basis. The following is a list (although not complete) of options that might be considered for consumer purchases:

- Burial plans
- Clothing
- Luggage
- Electronic items (i.e. TV, Radio, VCR, etc.)
- Camp/Tours
- Vacations (i.e. airfare to go visit family)
- Repaying overpayments (i.e. Social Security, Welfare)
- Medical visits, prescriptions and equipment not covered by Medi-Cal (Medi-Cal denial required before releasing monies)
- Personal items (not furnished by service provider)
- Recreational items (i.e. games, bicycle, etc.)
- Special needs or wants appropriate for the individual (i.e. veterinary expenses, floral arrangements, gifts for family members, etc.)
- Setting up an independent living household