

## **Instructions for 2021 ISS Renewals – Region 1**

1. All ISS plans need to be completed on the ***ICS Budget Template (10/4/2013)***, with the following tabs completed:
  - Application* – complete Section 1 of this tab
  - Housing* – complete pages 1 & 2 of this tab and make sure there are supporting documents for all the amounts entered on the template (i.e. income, expenses, etc.). Entries can be made in yellow areas.
2. Children in the household of the ISS participant can only be claimed as a dependent child until age 18. If a child still resides in the household who is age 19 or older, they need to be reflected as an “Other Individual” in the Residents section. Also, make sure that the ***age*** and relationship to the participant is completed for all children and/or anyone else residing in the household.
  - \*If a child is disabled and/or currently in school, they can be considered a dependent up to age 21.*
3. When completing the section for Housing Costs, only the following can be used as an offset for utilities, if not included in the rent: *Gas, Electric, Water/Sewer*. The average monthly cost for utilities needs to be verified via a utility bill in the tenant/co-tenant’s name, or a letter verifying the monthly average which was quoted by a utility company representative.
  - \*It is not allowable to use expenses such as garbage disposal, lawn care, phone & cable bills, car insurance, etc. as an offset. These do not qualify as a basic utility or offset to income in *any* circumstance.*
4. All renewal information needs to be submitted to the Regional Office via email. **All packets should be sent to the shared mailbox at [opwdd.sm.fliss@opwdd.ny.gov](mailto:opwdd.sm.fliss@opwdd.ny.gov)** If you have any questions, my email address is [jennifer.czyryca@opwdd.ny.gov](mailto:jennifer.czyryca@opwdd.ny.gov) Please ensure that the budget is in the original ***Excel*** format and ***not*** a scanned copy. We cannot accept or process budgets that are incomplete and/or not accompanied with ***all*** signed agreements and supporting documents. The approved renewal packets will be emailed to you from a department secretary, Jeffrey Roberts.
5. **Renewal packets are due to the DDRO no later than November 30, 2020.**
6. **When submitting** the budget template, supporting documentation, and signed agreements, label the files with the person’s last name and first initial/name. **The renewal packets, must consist of *only these 3 attachments*.** There should not be more attachments emailed than what is listed below.
  - ICS Budget Template*** (original Excel format and not the backup copy that ends in file extension.xlsx)
  - Supporting documents*** scanned in PDF format (including Renewal Checklist, lease, utility info, benefit and wage info, proof of Rep Payee costs, etc.). If there is a number on the budget template, there needs to be a document to verify the amount entered.
  - Signed Agreements*** (ISS QA Checklist, ISS Plan, ISS Agreement)
    - \* If due to Covid-19 restrictions the CC/CM is unable to make a face to face visit to complete the agreements and have the participant sign, please ensure it is noted on the signature lines that the individual or advocate provided verbal informed consent.*
7. If the ISS budget has been submitted for review and a drastic change to the budget occurs (i.e. change to wages, change in number of residents, SSI/SSDI benefits are awarded, Section 8 begins, etc.), please notify the DDRO as soon as possible and submit the new information.

8. The following documents are attached in the email:
- ICS Budget Template** – this is not new, but is a blank copy. I filled in basic information on the form to expedite the process (i.e. type of plan, DDRO information, budget effective dates). It is highly recommended to use a blank copy of the ICS budget template for each person. If you use the same template and make multiple changes to the document, calculation errors can occur.
  - 2021 Application Checklist** – this sheet is used to ensure that all necessary documentation is submitted with the budget for the annual renewal. Please add comments for any information that may not be self-explanatory on the budget or supporting documents. If there are drastic changes to the income and/or housing costs, please explain the situation. *Any information I need to be aware of for the renewal, should be noted on this form.*
  - ISS Agreements** which need to be completed and signed – QA Checklist, ISS Plan, ISS Participation Agreement. There were revisions made to these forms, so use the 9/10/20 version. Ensure all 3 forms are signed by the participant prior to the other parties signing off on the agreements.
  - Agency Management Plan** – only one is needed for all ISS participants enrolled with your agency. This should be completed and submitted after all the budgets are completed. Ensure this is completed and emailed to the DDRO prior to January 1, 2021.
9. For 2021, there *may be a small COLA increase* from the Social Security Administration (SSA). Unfortunately, the actual percentage of the COLA increase will not be confirmed until sometime in late October. I will email the actual COLA amount as soon as the information is available. Any ISS participant that receives *federal SSI* and/or SSDI benefits from the SSA, should have this increase included on the 2021 budget. If applicable, the 2021 increase can be calculated by multiplying the current benefit by .013 (if the COLA is 1.3%). For example, if the current benefit is \$783, the increase is \$13, and the 2021 benefit is \$796. Please note, the NYS share of SSI (SSP from OTDA) does not increase.
10. **ISS Helpful Hints** – if unsure what documentation is needed for Social Security benefits or *how to calculate wages*, please refer to the following:
- a. **Income:** The most current information needs to be submitted. *Do not* put food stamp (SNAP) or HEAP benefits in this section as this will lower the person’s monthly subsidy & does not need to be listed on the budget. There is a section on page 2 of the housing subsidy application to input food stamp benefits (although this is not considered countable income).
  - b. **Documentation for Social Security benefits** needs to be dated within the last year. Award letters from the SSA, Rep Payee Ledger, or bank statements may be supplied to show the amount of monthly benefits if the statement clearly identifies it as SSI/SSDI/SSP. ***Please note, as of 10/1/14, the federal and state share of SSI payments are paid in separate checks. If someone receives SSP (State Supplement Payment) from OTDA, this is part of the monthly SSI payment and countable income. If someone receives the maximum amount of federal SSI benefits, they will receive SSP benefits up to \$87/month and this is countable income.***
  - c. **Proof of wages** need to be verified by *paychecks, etc.* At minimum, proof of 1-3 months of wages needs to be submitted. A bank statement showing direct deposit is not sufficient. The “Net” wages (*after taxes*), not gross salary, are used for the calculations.
  - d. **Monthly wages and unemployment benefits** are calculated per the following formula:  
 \*Total Net wages *divided by* Number of weeks *multiplied by* 4.33 (average # of weeks in a month). Do not just add 4 weeks of work or 2 bi-weekly checks to calculate the monthly wages/salary.  
 \*For example, wages for 6 weeks are: \$40,50,45,60,75,25, which totals \$295. This is divided by six weeks (\$295/6= \$49.16) – this is the average weekly salary. Take this weekly total and multiply by 4.33 (\$49.16 x 4.33=\$212.89, which will round up to \$213) – this is the monthly wages total.  
 \*Also, it facilitates the approval process if you show your calculations that were used to figure the monthly wages, SSA benefits, utility costs, etc. If there is an error, this can be explained quickly.

11. **If any participants are not renewing their ISS case, or switching to another agency, please provide me with the list of names and reason for the change.** Also, a DDP-1 will need to be completed for an add or remove from your agency's ISS program.
  
12. **Please remember that all eligible ISS individuals must be living independently (with or without roommates), be a primary lease holder and have tenancy rights.** *Please note that landlord statements have frequently been used as proof of the rent amount. **A landlord statement should not be used in place of a valid rental or lease agreement.*** As part of the renewal process, everyone should ensure that there is a written agreement that specifies the lease term and conditions for tenancy.

If you have any questions or are missing any forms, please email or call.

Thank you,  
Jen