



Date: November 30, 2023

DMS Operations Memo 23-42

To: Income Maintenance Supervisors
Income Maintenance Lead Workers
Income Maintenance Staff

Affected Programs:

- | | |
|--|--|
| <input type="checkbox"/> BadgerCare Plus | <input type="checkbox"/> Caretaker Supplement |
| <input type="checkbox"/> FoodShare | <input type="checkbox"/> FoodShare Employment and Training |
| <input checked="" type="checkbox"/> Medicaid | |
| <input type="checkbox"/> SeniorCare | |

From: Jonelle Brom, Bureau Director
Bureau of Eligibility Operations and Training
Division of Medicaid Services

Jori Mundy, Bureau Director
Bureau of Enrollment and Eligibility Policy
Division of Medicaid Services

2024 Cost-of-Living Adjustment (COLA) for Medicaid for the Elderly, Blind, or Disabled

CROSS-REFERENCE

Medicaid Eligibility Handbook

EFFECTIVE DATE

January 1, 2024

PURPOSE

This operations memo announces this year's Social Security Cost-of-Living Adjustment (COLA) and the resulting increase in some Medicaid financial eligibility limits, effective January 1, 2024.

BACKGROUND

As announced by the Social Security Administration, the COLA for calendar year 2024 is 3.2% for the Social Security Administration (SSA) Old Age, Survivors and Disability Insurance (OASDI or Title II) Program and the Supplemental Security Income (SSI or Title XVI) Program.

The Medicare Part B costs are also updated based on the yearly amount set in federal law.

The federal COLA increase will result in changes to some of the Medicaid income levels, allowances, and deductions in CARES.

CARES eligibility redeterminations for January 2024 will occur as part of the annual mass change.

Note: SSI amounts will not be updated in CARES through the COLA mass change. SSI amounts will continue to be auto-updated on a weekly basis. The increase in federal SSI payments will appear as an auto-update after adverse action in December 2023 and will impact February 2024 benefits. The regular SSI auto-update alerts will be generated when these amounts change.

There will not be a COLA increase in state SSI Supplement or Supplemental Security Income Exceptional Expense (SSI-E) payment amounts.

POLICY

EBD DEDUCTIBLES

Per MEH, 24.6.1, increases in Social Security benefits due to the COLA may not result in increases to the amount of met or unmet deductibles. However, any increases in Medicare premiums must be used to adjust the amount of any remaining unmet deductibles.

NEW PROGRAM AMOUNTS FOR 2024

INSTITUTIONAL MEDICAID CATEGORICALLY NEEDY MONTHLY INCOME LIMIT

Cross Reference: Medicaid Eligibility Handbook, Section 39.4

Effective Date: January 1, 2024, unless otherwise noted

ITEM	NEW AMOUNT	OLD AMOUNT
Categorically needy monthly income limit for a person in a medical institution	\$2,829	\$2,742

ELDERLY, BLIND, AND DISABLED (EBD) MEDICAID MONTHLY INCOME LIMITS AND ASSET LIMIT CHANGES

Cross Reference: Medicaid Eligibility Handbook, Section 39.4

Effective Date: January 1, 2024

ITEM	NEW AMOUNT	OLD AMOUNT
Categorically Needy Monthly Income Limits		
Group Size of 1	\$1,026.78	\$997.78
Group Size of 2	\$1,547.05	\$1,503.05
Categorically Needy Asset Limits		
Group Size of 1	No Change	\$2,000
Group Size of 2	No Change	\$3,000
Medically Needy Asset Limits		
Group Size of 1	No Change	\$2,000
Group Size of 2	No Change	\$3,000

Note: The Medically Needy monthly income limits will be updated in early 2024 when the Federal Poverty Level income guidelines are updated.

MONTHLY EBD DEEMING AMOUNT TO AN INELIGIBLE MINOR

Cross Reference: Medicaid Eligibility Handbook, Sections 1.1.3.3, 15.1.2 and 39.4

Effective Date: January 1, 2024

ITEM	NEW AMOUNT	OLD AMOUNT
Monthly EBD Deeming Amount to an Ineligible Minor	\$472	\$457

MONTHLY PARENTAL LIVING ALLOWANCE

Cross Reference: Medicaid Eligibility Handbook, Sections 1.1.3.3, 15.1.2, and 39.4

Effective Date: January 1, 2024

ITEM	NEW AMOUNT	OLD AMOUNT
Monthly Parental Living Allowance – 1 Parent	\$943	\$914
Monthly Parental Living Allowance – 2 Parents	\$1,415	\$1,371

SPOUSAL IMPOVERISHMENT INCOME ALLOCATION AND ASSET SHARE

Cross Reference: Medicaid Eligibility Handbook, Chapters 18.6.2 and 18.4.3

Effective Date: January 1, 2024

Income:

ITEM	NEW AMOUNT	OLD AMOUNT
Community Spouse Asset Share (CSAS) maximum	\$154,140	148,620
Income allocation maximum (monthly)	\$3,853.50	3,715.50

Assets:

IF the total countable assets of the couple are:	THEN the CSAS is:	MA Eligibility Limit
\$308,280 or more	\$154,140	\$156,140
Less than \$308,280, but greater than \$100,000	half the total countable assets of the couple	½ + \$2,000
\$100,000 or less	\$50,000	\$52,000

Income Allocation and Allowance:

<p>Community Spouse Allocation</p>	<p>The maximum allocation is the lesser of: \$3,853.50, or \$3,286.67 plus excess shelter allowance. (The lower allocation limit does not change with the COLA increases. This amount will be updated on July 1.)</p> <p>“Excess shelter allowance” means shelter expenses above \$986.00. Shelter expenses are mortgage, rent, taxes, maintenance fees, and a utility allowance. (The excess shelter allowance does not change with the COLA increases. This amount will be updated on July 1.)</p>
<p>Dependent Family Member Income Allowance Standard</p>	<p>\$2,465.00 (This amount does not change with the COLA increases. This amount will be updated on July 1.)</p> <p>The maximum allowance per dependent family member is \$821.67.</p>
<p>Personal Needs Allowance</p>	<p>\$45 for institutionalized individuals (no change)</p>
<p>Community Waivers Allowance</p>	<p>\$1,123 to \$2,829 for a person in community waivers</p>

NOTE: The dollar amounts for income allocation and allowance are monthly amounts.

SPOUSAL IMPOVERISHMENT FACT SHEET

IM workers and members can access the Wisconsin Medicaid Spousal Impoverishment Protection fact sheet, P-10063, in the publications library: dhs.wisconsin.gov/library/P-10063.htm

2024 MEDICARE PART B PREMIUM AMOUNT BASED ON INCOME

Some people who get Social Security benefits will pay less than the standard monthly premium amount of \$174.70.

The people who pay the standard monthly premium or higher amounts shown in the chart below are those who fall into one of the following groups:

1. Individuals enrolled in Part B for the first time in 2024
2. Individuals who do not receive Social Security benefits.
3. Individuals who are directly billed for Part B premiums.
4. Individuals who have Medicare and Medicaid, and Medicaid pays their premiums (the state of Wisconsin will pay the standard premium amount of \$174.70).
5. Individuals whose modified adjusted gross income as reported on their IRS tax return from 2022 is above a certain amount.

Cross Reference: None

Effective Date: January 1, 2024

Yearly Income (as Reported on the 2022 IRS Tax Return)			
Single	Married (Filing Jointly)	Married (Filing Separately)	Monthly Premium
\$103,000 or less	\$206,000 or less	\$103,000 or less	\$174.70
\$103,001 – \$129,000	\$206,001 - \$258,000		\$244.60
\$129,001 – \$161,000	\$258,001 - \$322,000		\$349.40
\$161,001 – \$193,000	\$322,001 - \$386,000		\$454.20
\$193,001 – \$499,999	\$386,001 – \$749,999	\$103,001 – \$396,999	\$559.00
\$500,000 and above	\$750,000 and above	\$397,000 and above	\$594.00

More information on Part B premiums is available at the following Medicare website:

<https://www.cms.gov/newsroom/fact-sheets/2024-medicare-parts-b-premiums-and-deductibles>

SSI-E MONTHLY PAYMENT LEVEL

Cross Reference: Medicaid Eligibility Handbook, Section 39.4

Effective Date: No change

ITEM	NEW AMOUNT	OLD AMOUNT
State SSI-E Supplement monthly payment	No Change	\$95.99

MONTHLY SSI PAYMENT LEVEL+ SUPPLEMENT (HOME MAINTENANCE MAXIMUM ALLOWANCES)

Cross Reference: Medicaid Eligibility Handbook, Sections 15.7.1 and 39.4

Effective Date: January 1, 2024

ITEM	NEW AMOUNT	OLD AMOUNT
Monthly SSI Payment Level + E Supplement	\$1,122.77	\$1,093.77

COMMUNITY WAIVERS MONTHLY BASIC NEEDS ALLOWANCE

Cross Reference: Medicaid Eligibility Handbook, Sections 28.8.3 and 39.4

Effective Date: January 1, 2024

ITEM	NEW AMOUNT	OLD AMOUNT
Monthly Basic Needs Allowance	\$1,123	\$1,094
EBD Maximum Monthly Personal Maintenance Allowance	\$2,829	\$2,742

COMMUNITY WAIVERS SPECIAL INCOME LIMIT (GROUP B)

Cross Reference: Medicaid Eligibility Handbook, Sections 28.8.3 and 39.4

Effective Date: January 1, 2024

ITEM	NEW AMOUNT	OLD AMOUNT
Monthly income limit for a single person or spouse not applying	\$2,829	\$2,742

TUBERCULOSIS BENEFIT MONTHLY INCOME LIMIT

Cross Reference: BadgerCare Plus Eligibility Handbook, Chapter 43.2

Effective Date: January 1, 2024

ITEM	NEW AMOUNT	OLD AMOUNT
Monthly income limit for one person	\$1,971	\$1,913
Monthly income limit for a married couple	\$2,915	\$2,827

MEDICARE SAVINGS PROGRAM ASSET LIMITS

Cross Reference: Medicaid Eligibility Handbook, Section 25.7.2

Effective Date: January 1, 2024

ITEM	NEW AMOUNT	OLD AMOUNT
Asset limit for one person	\$9,430	\$9,090
Asset limit for two persons	\$14,130	\$13,630

Applies only to Qualified Medicare Beneficiary (QMB), Specified Low-Income Medicare Beneficiary (SLMB), and Specified Low-Income Medicare Beneficiary Plus (SLMB+); does not apply to Qualified Disabled and Working Individuals (QDWI).

COST-OF-LIVING ADJUSTMENT (COLA) DISREGARD

Cross Reference: Medicaid Eligibility Handbook, Section 39.6

Effective Date: January 1, 2024

Month SSI last received:	Multiply 2024 OASDI by:	Multiply 2023 OASDI by:
Jan 2023 - Dec 2023	0.031008	--
Jan 2022 - Dec 2022	0.108563	0.080037
Jan 2021 - Dec 2021	0.158227	0.131291
Jan 2020 - Dec 2020	0.169030	0.142439
Jan 2019 - Dec 2019	0.182116	0.155944
Jan 2018 - Dec 2018	0.204393	0.178934
Jan 2017 - Dec 2017	0.219993	0.195033
Jan 2016 - Dec 2016	0.222326	0.197441
Jan 2015 - Dec 2015	0.222326	0.197441
Jan 2014 - Dec 2014	0.235326	0.210856
Jan 2013 - Dec 2013	0.246626	0.222518
Jan 2012 - Dec 2012	0.259220	0.235515
Jan 2011 - Dec 2011	0.284961	0.262080
Jan 2010 - Dec 2010	0.284961	0.262080
Jan 2009 - Dec 2009	0.284961	0.262080
Jan 2008 - Dec 2008	0.324160	0.302533
Jan 2007 - Dec 2007	0.339355	0.318214
Jan 2006 - Dec 2006	0.360459	0.339994
Jan 2005 - Dec 2005	0.385648	0.365989
Jan 2004 - Dec 2004	0.401799	0.382657
Jan 2003 - Dec 2003	0.414103	0.395354
Jan 2002 - Dec 2002	0.422192	0.403703
Jan 2001 - Dec 2001	0.436835	0.418813
Jan 2000 - Dec 2000	0.455879	0.438467
Jan 1999 - Dec 1999	0.468632	0.451628
Jan 1998 - Dec 1998	0.475451	0.458665

Month SSI last received:	Multiply 2024 OASDI by:	Multiply 2023 OASDI by:
Jan 1997 - Dec 1997	0.486240	0.469800
Jan 1996 - Dec 1996	0.500719	0.484742
Jan 1995 - Dec 1995	0.513371	0.497799
Jan 1994 - Dec 1994	0.526626	0.511478
Jan 1993 - Dec 1993	0.538622	0.523858
Jan 1992 - Dec 1992	0.552060	0.537726
Jan 1991 - Dec 1991	0.568042	0.554220
Jan 1990 - Dec 1990	0.590173	0.577059
Jan 1989 - Dec 1989	0.608570	0.596044
Jan 1988 - Dec 1988	0.623625	0.611581
Jan 1987 - Dec 1987	0.638796	0.627237
Jan 1986 - Dec 1986	0.643431	0.632021
Jan 1985 - Dec 1985	0.654152	0.643085
Jan 1984 - Dec 1984	0.665848	0.655155
Jul 1983 - Dec 1983	0.677148	0.666816
Jul 1982 - Jun 1983	0.699393	0.689773
Jul 1981 - Jun 1982	0.729670	0.721019
Jul 1980 - Jun 1981	0.763490	0.755922
Jul 1979 - Jun 1980	0.784796	0.777909
Jul 1978 - Jun 1979	0.797930	0.791464
Apr 1977 - Jun 1978	0.809188	0.803082

CONTACTS

DHS/DMS/BEEP/EB