

RESOURCES**PERSONAL NEEDS ALLOWANCE ACCOUNTS**

- Description:** Personal needs allowance (PNA) is the amount that is set aside to meet the personal needs of persons who: are residing in a medical institution and are in permanent absence status; or have community spouses and are in receipt of home and community-based waived services. The Personal Needs Allowance (PNA) amount is the reduced standard of need for persons who are residing in a medical facility and are in permanent absence status (see Glossary).
- Policy:** Medical facilities must offer each resident who is a Medicaid recipient or his/her representative the choice of: depositing his/her PNA in an interest bearing account managed by the facility; or managing his/her own PNA account. The PNA account is intended to meet the recipient's incidental expenses not provided by the medical facility.
- References:**
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| SSL Sect. | 369(b)(i)&(ii)
366(2)(a)(10) |
| Dept. Reg. | 360-4.9
10 NYCRR 415.26(h)(5) |
| ADM | 94 ADM-17 |
- Interpretation:** Services included in a facility's Medicaid per diem rate may not be charged against an individual's PNA account. In addition, no charge may be made against the PNA account for other services provided under Medicaid, Medicare, or other third party coverage. When the recipient selects the medical facility to manage his/her PNA funds, the facility must:
- (a) maintain an accurate account of the funds, including the nature and dates of all deposits/withdrawals, any accumulated interest and a continuing balance;
 - (b) document all transactions by securing and maintaining paid bills, vouchers, and signed receipts. The signature of the resident or his/her designated representative is recorded for each transaction;