

# CHANGE NOTICE FOR MANUAL NO. 06-22, DISABILITY

**DATE: NOVEMBER 1, 2022**

**Manual:** Aged, Blind, and Disabled Medicaid

**Change No:** 06-22

**To:** County Directors of Social Services

## I. BACKGROUND AND CONTENT OF CHANGE

The Division of Health Benefits (DHB) has made additional updates to [MA-2525, Disability](#) to provide clarification and guidance regarding regulations and procedures for applicants/beneficiaries (a/b) applying for Medicaid for the Disabled (MAD). Clarification for procedures for submitting documents to Disability Determination Services (DDS) has been added. The procedures have been reviewed and included in training provided to all counties by the Operational Support Team (OST) and can be found on the NC FAST Learning Gateway.

## II. POLICY UPDATE

### A. Section II Definitions

Updates to section G. Diary/Re-Exam Date

The definition has been updated to refer to the new State of North Carolina Disability Transmittal form. This is a new form that will now be used in the transmission of information **from** DDS **to** the local agency.

**Note:** Local agencies may continue to receive information via the [DHB-4037, Disability Transmittal](#) form as DDS continues to transition to the new State of North Carolina Disability Transmittal form.

### B. Section III Policy Principles

1. Updates to section A. When A Disability Determination by DDS Is Required.

This section now clarifies that the task created by NC FAST notifying the caseworker that a Diary/Re-exam is due will be created two months prior to the review being due.

2. Updates to section C. Verification of Disability Status

This section has been updated to clarify:

Caseworkers should confirm disability status for RSDI recipients by reviewing Online

Verification Service (OVS) in NC FAST.

3. Updates to section D. Continue to Determine Eligibility for Other Medicaid Programs

This section has been updated to clarify that at application caseworkers must:

- a. Continue to determine Medicaid eligibility including Family Planning Program (FPP) without regard to a pending disability determination, pending medical bills to meet a deductible, or reserve reduction for applicable programs.
- b. Authorize FPP if otherwise eligible the first day of the application month.
- c. Apply MAGI budgeting methodologies to individuals in the Family Planning Program and follow applicable processing time standards.

**C. Section IV Applications/Reapplications – Disability not established.**

This section has been reordered and section headings reworded for clarity.

1. Updates to section B. A Complete Disability Referral Includes

- a. Information found in section B. was previously provided in section C.
- b. Section heading has been reworded and the section has been reorganized for clarity.
- c. Reference has been added for where to find instructions for completing the [DHB-5028, Authorization to Disclose Information](#).
- d. Reference has been added for where to find instructions for completing the [DHB-4037, Disability Determination Transmittal](#).
- e. DDS will return the State of North Carolina Disability Transmittal to the local agency when the disability referral forms are not submitted or are incomplete.

2. Updates to section C. The DDS Assessment

- a. Information in this section was previously found in section D.
- b. Section heading has been reworded and the section has been reorganized for clarity.
- c. A DDS Assessment must be keyed in NC FAST for all MAD applications requiring a disability assessment.
- d. Clarification regarding submission of the DDS Assessment for the ongoing application only when there is both a retroactive and ongoing application submitted.
- e. Requirements for information to include on the DDS Assessment, including when to provide information for a third-party.

3. Updates to section D. Social History Summary for the Disabled
  - a. Information in section D. was previously found in section B.
  - b. Clarification for submitting information found on the [DHB-5009, Social History Summary for the Disabled.](#)
4. Updates to section E. Authorization to Disclose Information
  - a. This section has been reworded and reorganized for clarity.
  - b. Hyperlinks to forms have been added.
  - c. E.3. has been added for clarification that only one copy of the [DHB-5028](#) is required to be uploaded to NC FAST. The uploaded [DHB-5028](#) must include both front and back pages.
  - d. E.6.a. now includes instructions that a witness signature is required if the claimant signs with an “X”.
  - e. E.6.d. gives updated instructions for uploading a copy of the death certification when applicable.
5. Updates to section F. Disability Determination Transmittal

Section F.5 now has the updated process of an NC FAST task when appropriate forms are not submitted **or** are incomplete.
6. Updates to section G. Medical Records

Section G. updates include guidance for the caseworker to determine if DDS medical records have been stored electronically by DDS or if paper records were returned to the local agency for retention. When retained electronically by DDS, the local agency does not need to forward them to DDS for subsequent applications.

#### **D. Section VI. Disability Decision**

1. A reminder has been added that the exclusion of days ends the date that DDS enters the disability decision.
2. The process that DDS will follow to upload the State of North Carolina Disability Transmittal has been added.
3. [DHB-4037](#) has been changed to the State of North Carolina Disability Transmittal throughout section VI.

#### **E. Section X. Appeal Reversal of MAD Disability Denial**

Section A. has been revised to clarify that eligibility must be determined from the original

date of application.

**F. Section XI. Active MAD Beneficiary with SSA/SSI Termination or Denial**

The reference in subsection B. has been updated to reference XIII.

**G. Section XIV. Recertification of Disability for MAD Children Under Age 18**

[DHB-4037](#) references have been changed to the State of North Carolina Disability Transmittal throughout.

**H. Section XV. Recertification of Continued Disability for Non-SSI Adults Over Age 18**

[DHB-4037](#) references have been changed to the State of North Carolina Disability Transmittal throughout.

**I. Forms**


The following forms have been changed from DMA to DHB throughout the policy.

- a. DHB-5009, Social History Summary for the Disabled
- b. DHB-5202C, Designation of Authorized Representative – Appendix C

**III. EFFECTIVE DATE AND IMPLEMENTATION**

This policy is effective upon receipt. This change notice applies to all pending applications and recertifications.

If you have any questions regarding information in this letter, please contact your [Medicaid Operational Support Team Representative](#).

DocuSigned by:  


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Dave Richard

Deputy Secretary, NC Medicaid