

NC Division of Aging and Adult Services
CHANGE NO. 01-08

DATE: March 12, 2008

Manual: State/County Special Assistance for Adults
Subject: Special Assistance for Adults Program Manual Updates
To: County Directors of Social Services
Effective: March 1, 2008

I. BACKGROUND

The State/County Special Assistance (SA) for Adults Manual for the following sections has been updated to include material addressed in previous Administrative Letters, hyperlinks to forms and other manual sections, and policy clarifications and additions.

Corrected budgeting instructions are provided for SA-3220 when an SA applicant/recipient (a/r) moves from the SA Adult Care Home (ACH) Basic section of a facility to an SA/ACH Special Care Unit (SCU) after the first of the month. An underpayment can result in this situation under existing policy. Instructions for issuing an SA supplement for those affected by this are provided.

A. SA/ACH Basic Rate Increases In 2007

This change notice incorporates the 2007 rate changes in the SA /ACH Basic rate addressed in Administrative Letters 06-17 and 07-13.

B. Social Security Cost-of-Living Allowance for 2008

This change notice incorporates into SA policy DAAS Administrative Letter 07-22 addressing the January 1, 2008 cost-of-living increase for recipients of RSDI and/or SSI, and VA.

II. CONTENT OF CHANGE AND POLICY IMPLEMENTATION

A. SA-3100, Eligibility Requirements, Reissued

SA-3100, Eligibility Requirements, now includes a section on determining eligibility for applicant/recipients of Special Care Units.

B. SA 3200, SA Resources Guidelines, Reissued

1. This section is updated to include a reminder that although SSI and SSA lump sums are excluded from resources for nine months, they must be applied to the SA income calculation for the payment months designated by Social Security in the award letter, if the award occurs during the application process.

2. Clarification is provided on documenting and excluding a vehicle that shows in the Department of Motor Vehicles (DMV) listing, but the a/r no longer owns.
 - a. Apply the change to all applications pending as of March 1, 2008.
 - b. Apply the change in policy for ongoing cases to all changes in situation beginning March 1, 2008.
3. An explanation of fee simple is added.
4. An explanation of tenancy-by-the-entirety is added.

C. SA-3220, Budgeting Principles, Reissued

1. This section is updated to include the SA/ACH Basic rate increase from \$1,148 to \$1,173 that was effective October 1, 2007 and was addressed in DAAS Administrative Letter 07-13 dated August 28, 2007. Examples now reflect the January 2008 COLA.
2. Updated instructions are included for budgeting a partial payment when a private pay a/r, who was ineligible for SA/ACH Basic solely due to income moves to an SCU after the first of the month, and is then eligible for SA/ACH SCU due to the higher SCU rate, and income limit. Apply this change to all pending applications effective March 1, 2008.
3. Corrected budgeting instructions are included for issuing a supplemental SA payment when an SA/ACH Basic recipient moves to an SCU after the first of the month. Follow instructions in SA-3300 VII. B., Reimbursement of Underpayments, when issuing supplemental payments for SCU.
 - a. Apply the change to all pending applications when a change in situation occurs during the application process beginning March 1, 2008.
 - b. Apply the change in budgeting for ongoing cases when a change in situation occurs beginning March 1, 2008.

D. SA-3300, Administration of Checks and Payments, Reissued

1. The section is updated to reflect the SA/ACH Basic rate increase from \$1,148 to \$1,173 that was effective October 1, 2007.
2. This section is updated to provide clarification on the process of reporting and refunding county responsible overpayments.
3. The section is updated to reflect increased SA/ACH Basic rates, and the January 2008 COLA for SSI.

E. SA-3320, Redetermination of Eligibility, Reissued

1. This section is updated to include information on verifications for ongoing SCU recipients.
2. This section is updated to instruct caseworkers to verify that a facility is SA authorized, and for SCU recipients, that the facility has a licensed Special Care Unit for Alzheimer's or related disorders.
3. No action is needed as this was addressed in Administrative Letter 05-08.

F. Other Sections Reissued to Reflect Corrected Hyperlinks Only

1. SA-3205, Transfer of Resources
2. SA-3310, Changes in Situation

III. DAAS Administrative Letters Obsoleted by this policy

- A. DAAS Administrative Letter 06-17
- B. DAAS Administrative Letter 07-13
- C. DAAS Administrative Letter 07-22

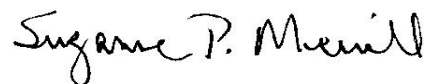
IV. Maintenance of Manual

The following manual sections are reissued to reflect the mandated requirements:

- A. [SA-3100 Eligibility Requirements](#)
- B. [SA-3200 Resources](#)
- C. [SA-3205 Transfer of Resources](#)
- D. [SA-3220 Budgeting Principles](#)
- E. [SA-3300 Administration of Checks and Payments](#)
- F. [SA-3310 Changes in Situation](#)
- G. [SA-3320 Redetermination of Eligibility](#)

If you have any questions regarding this information, please contact your Adult Programs Representative, or Brenda Porter, SA Program Coordinator at 919-733-3818.

Sincerely,



Suzanne P. Merrill, Chief
Adult Services Section