

NC Division of Aging and Adult Services
CHANGE NO. 03-08

DATE: October 17, 2008

Manual: State/County Special Assistance for Adults
Subject: Special Assistance for Adults Program Manual Updates
To: County Directors of Social Services
Effective: 11-1-2008

I. BACKGROUND

The Division of Aging and Adult Services has identified the need for policy clarification and revisions for the Special Assistance for Adults Program Manual. The needed changes were identified through discussions with county staff while conducting Special Assistance (SA) training and SA monitoring. The purpose of this change notice is to incorporate these clarifications, as well as other helpful information, into the SA manual.

The State/County Special Assistance (SA) Manual sections, Preface, SA-3000, Acronyms and Definitions, SA-3100, Eligibility Requirements, SA-3100, Application Process, and SA-3210, Income, have been reissued. Changes to the sections reflect policy revisions, clarifications; updated material addressed in previous Administrative Letters; new links to helpful resources; and corrected hyperlinks. Procedural instructions have been added to these sections to assist SA case workers with the application and redetermination process.

II. CONTENT AND IMPLEMENTATION OF CHANGE

A. Reissued Manual sections listed below are effective October 1, 2008

B. Preface

1. The preface has been updated to reflect current data.
2. No action is required on this change.

C. SA-3000 Acronyms and Definitions

1. This section has enhanced several definitions and added new ones.
2. Hyperlinks have been corrected.
3. No action is required on this change.

D. SA-3100 Eligibility Requirements

This section includes the following policy additions and changes:

1. SA-3100 I: Restatement and clarification of the policy that requires every applicant to apply for SSI and all other benefits to which he/she may be entitled. Applicants/recipients whose income is less than the current federal benefit rate (FBR) must apply for SSI. This section clarifies the relationship between the SA Program and SSI.
2. SA-3100 II. A: Provides a list of the facility types which can be SA eligible.
3. SA-3100 II. B: Adds that a non-SSI recipient must meet the eligibility requirements for SSI except for income.
4. SA-3100 III B: Clarifies the age range for disability.
5. SA-3100 III D.1: Refers to the Medicaid Bulletin for Special Care Unit prior approval.
6. No new action is required for this section.

E. SA-3110 Application Process

This section includes the following policy additions and changes:

1. SA-3110 I. A: Instructions and guidance for the Income Maintenance Caseworker (IMC) when working with applicants who have legal documents in place giving others the authority to act on their behalf. Information about legal documents is also provided.
2. SA-3110 I. A: Instructions on releasing information to a third party.
3. SA-3110 I.B: This section clarifies the relationship between the SA Program and SSI.

Restatement and clarification of the policy that requires every applicant to apply for all SSI and all other benefits to which he/she may be entitled. Applicants/recipients whose income is less than the current federal benefit rate (FBR) must apply for SSI. Those receiving SSI only, at less than the FBR must apply to receive the maximum SSI benefit for which he/she is eligible. This restatement is found throughout SA-3110.

4. SA-3110 II. A: New instructions on assuring the applicant can apply without delay, exceptions to applying on the same day.

5. SA-3110 II. F: Instructions for when an applicant requests an application appointment. This change is now aligned with Medicaid policy.
6. SA-3110 III. B: Enhanced information about retroactive Medicaid benefits.
7. SA-3110 III. D.3: Clarifies the length of time an application can pend awaiting a decision from Social Security.
8. SA-3110 III. H: Enhanced instructions about application requests by mail; and SA-3110 III. J: enhanced instructions when a DMA-5000 Mail-In Application for Medicaid is received and the person wants to apply for SA.
9. SA 3110 IV. A: Instructions to request applicant's signature on the DMA-5001, Notice on the Use of Social Security Numbers.
10. SA 3110 IV. D: Instructions that application can be denied for failing to provide necessary collateral contacts.
11. SA 3110 IV. F: Updated managed care information.
12. SA 3110 IV. G: Enhanced instructions on correct completion of the FL 2.
13. SA 3110 V. B(1): Enhanced instructions in working with applicants whose income is below the Federal Benefit Rate.
14. SA 3110 V. B (6): Additional information and explanation on estate recovery for Medicaid Personal Care Services.
15. SA-3110 VI: States the requirement for counties to complete the DSS-8190-S or DSS-8190-NS.
16. SA-3110 VI B. 2: Removed the reference requiring the completion of the CAP/MR level of care recommendation during the SA application timeframe. This is a CAP MR requirement, not an SA requirement.
17. SA-3110 VI. C. 1.a-p and 4: Explanation on using the State Data Exchange (SDX) to obtain valuable information for the SA application process including enhanced procedures and instructions on verification of disability date of onset, resources, third party liability for health care expenses, facility eligibility information, and documentation of a/r mailing and physical address.
18. SA-3110 VI .C. 1 n: Explanation on using the State Data Exchange (SDX) to verify SSI eligibility and benefits. An explanation is included on SSI benefits below the FBR.

19. SA-3110 VII. 2.b.(1): Adds that the IMC must request from the applicant via a DMA-5097, Request for Information, verification from a third party or other agencies such as Social Security Administration or Veterans' Administration verification.
20. SA 3110 VII. 8: Enhanced directions on disposing of a pending application.
21. SA 3110 VIII: Clarification and enhanced information on establishing eligibility for disability if under age 65.
22. SA-3110 X: Clarification of effective date of payment for certain situations. Particular attention is given to the E02 month, and the month a person turns 65.
23. SA-3110 XI: References the Medicaid Manual for effective date of Medicaid.
24. SA-3110 XII: Provides a reference and link to the code appendices for types of disposition.
25. SA-3110 XIII: Revised courtesy application policies and procedures. In order to assure that the applicant can apply without delay. *Without delay* is defined as on the same day the applicant, or a representative of the applicant's choice, appears at the county department of social services. This policy has been changed and now states that:
 - a. When it is discovered that an individual is a resident of another county by SA definition, do not deny the applicant the right to apply. The county must follow the procedures outlined in Section 3110, Application Process, XIII B.
 - b. If the county of residence does not wish to allow a courtesy application to be taken by the county where the applicant/representative has presented, the county of residence must determine how the applicant can apply without delay.
 - c. This section offers guidance for circumstances where cases must be reassigned to the county of residence.
 - d. Implementation of this revised policy on courtesy applications for new applications is effective October 1, 2008.

F. SA-3210 Income

This section includes the following policy changes and updates:

1. Throughout SA-3210, wording has changed to reflect a policy clarification regarding the receipt of unearned income. The policy throughout now reads that SA will count unearned income “received or awarded”.
2. SA-3210 II. B: Specific instructions for when an applicant/recipient (a/r) must apply for SSI.
3. SA-3210 II. C and D: Instructions on ways to identify cases where the a/r is receiving SSI but is receiving less than the federal benefit rate (FBR).
4. SA-3210 II. E: Clarification that even though SSI designated 1619 (b) a/rs meet disability and resource requirements for SA, that as long as they are not receiving an SSI payment the county must verify earned income as they would for non-SSI recipients.
5. SA-3210 II. F. and G: Specific instructions on the responsibility of the a/r and the IMC in restoring SSI to the FBR, how to budget these cases, and when to deny a case if the a/r fails to apply for the FBR.
6. SA-3210 II.H: New section with special instructions for couples.
7. SA-3210 II. I and J: Instructions on how to count income amounts in OLV and SOLQ/SDX including the \$20 income exclusion.
8. Updated income computation figures throughout the section.
9. SA-3210 IV. B. 22: Enhanced guidance and instructions regarding reverse mortgages.
10. SA-3210 IV.C.15 b (3): **Obsoletes Appendix B**, removes the reference to Appendix B, replacing it with links to resources within the body of SA-3210.
11. SA-3210 V: Clarification on determining countable income for non-SSI a/rs.

III. DAAS ADMINISTRATIVE LETTERS OBSOLETE BY THIS POLICY

DAAS Administrative Letter 07-07 Estate Recovery for Personal Care Services for Special Assistance recipients.

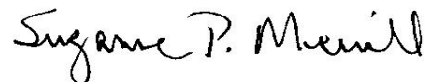
IV. MAINTENANCE OF MANUAL

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

- A. [Preface](#)
- B. [SA-3000 Acronyms and Definitions](#)
- C. [SA-3100 Eligibility Requirements](#)
- D. [SA-3110 Application Process](#)
- E. [SA-3210 Income](#)

If you have any questions regarding this information, please contact your [Adult Programs Representative](#).

Sincerely,



Suzanne P. Merrill, Chief
Adult Services Section

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