

## CHANGE NOTICE FOR MANUAL

**DATE: SEPTEMBER 25, 2002**

**Manual:** State/County Special Assistance for Adults

**CHANGE NO:** 05-02

**To:** County Directors of Social Services

**Effective:** October 1, 2002

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### **I. BACKGROUND AND DESCRIPTION OF CHANGES**

#### **A. In-Kind Contributions for Support and Maintenance**

SA-3210, Income, is revised to delete in-kind support and maintenance as countable income. Effective October 1, 2002, contributions by a third party for food, clothing or shelter are no longer considered income if paid directly to the provider.

In some cases, a recipient's family wishes to supplement the recipient's payment to the facility so the recipient may have a private room in a regular unit or a semi-private or private room in a special care unit in the facility. These payments will not be counted as income when determining Special Assistance eligibility or payment amount if paid directly to the facility.

This additional payment must be voluntary on the part of the third party making the contribution. Facilities are still required to accept the maximum Special Assistance rate as payment in full for recipients who reside in regular semi-private rooms.

The Division of Facility Services is aware of this policy change and is issuing instructions to facilities to clarify that supplemental payments above the maximum allowable rate must be for a private room in a regular unit or for a semi-private or private room in a special care unit.

It is anticipated that few applicants/recipients will be affected by this change. However, the Division is requesting counties to gather information needed to determine the frequency of supplemental, third party payments to facilities in order to evaluate how this change affects the number of SA eligibles. Because there is no automated tool available, an In-Kind Income Documentation Log is attached to this change notice for use in gathering information. Instructions for using the log are included in the Implementation Instructions below.

**B. Cherokee Indian Gaming Proceeds –**

Instructions are expanded for the treatment of gaming proceeds for a member of the Cherokee Indian tribe. If the payment is received during an application month, it is countable income in the month received. Any portion remaining after the month of receipt is a countable resource. For ongoing cases, any portion remaining after the month of receipt is considered a countable resource.

**C. Impairment Related Work Expenses – I**

Instructions are expanded for verifying and deducting Impairment Related Work Expenses when calculating earned income. These instructions are consistent with those in the Medicaid manual.

**D. Outline –**

The outline of the section is divided into smaller sections for easier reference. All cross-references in this section are updated to reflect this change.

**II. EFFECTIVE DATE – October 1, 2002**

**III. IMPLEMENTATION Instructions**

Apply these changes to all applications in process on or taken on or after October 1, 2002, and to all redeterminations in process on or begun on or after October 1, 2002.

**In-Kind Income Documentation Log**

Attached is an In-Kind Income Documentation Log. At each application and redetermination when discussing income eligibility, ask if any source is supplementing the applicant/recipient's payment for cost of care in the facility. If the answer is yes, document the case on the log, including the amount paid to the facility if known. Maintain the log in a central place available to all SA caseworkers and supervisors. The SA Program Consultant or Adult Programs Representative will periodically request information from the log. Counties will be notified once the log is no longer needed. It will mostly likely be maintained for one to two years.

**IV. MAINTENANCE OF MANUAL**

Replace SA-3210, effective 10/1/02

If you have any questions regarding this information, please contact your Adult Programs Representative or Jackie Franklin, SA Program Consultant, at 919-733-3677.



John T. Tanner, Chief  
Adult and Family Services Section