

## Screening for Medicaid Eligibility under the COLA Pass-along

Use the screening guide below to determine if an individual qualifies for COLA **Pass-along** status (under the Pickle Amendment). If the individual is unable to answer the questions or is unsure of any answers, check other resources to determine **Pass-along** status. **Document the applicant/beneficiary (a/b) Pass-along Eligibility or Ineligibility on the Person Page in NC FAST.** Refer to MA-2110, **Pass-along**.

\*This screening guide is to be used to identify individuals eligible for COLA **Pass-along** only. For widow(er)s and adult disabled children, also evaluate under other **Pass-along** groups. Refer to MA-2110, **Pass-along** and **DHB-5150A Pass-along Screening Guide**.

**Step One:** Ask the applicant the following questions and check other sources to determine if the a/b qualifies for **Pass-along**.

**Question 1:** Are you now receiving a Social Security check?

\_\_\_\_\_ If **no, STOP**. The individual is not eligible.

\_\_\_\_\_ If **yes**, continue to question 2.

**Question 2:** After April 1977, has there ever been a month in which you were eligible for, and received, both a Social Security check and a SSI or SA **check** (or did you get SSI only and then were found retroactively eligible for Social Security for that month)?

\_\_\_\_\_ If **no, STOP**. The individual is not eligible **for COLA Pass-along. Evaluate under other Pass-along groups.**

\_\_\_\_\_ If **yes**, continue to question 3.

**Question 3:** What is the last month in which you were eligible for and received both Social Security and SSI or Social Security and SA \_\_\_\_\_?

**Step Two:** Look up the month and year in which the person last received both Social Security and SSI. Refer to the Pickle Chart in MA-2110 **Pass-along**. Find the percentage that applies to the year SSI or SA stopped. Multiply the current amount of the person's (and/or spouse's) Social Security benefits by the applicable percentage. Use this amount after multiplying as the countable SSA income.

Current Social Security benefit amount		_____	
Percentage from table for applicable month	X	_____	%
Countable Social Security income	=	_____	
Other Countable income	+	_____	
Total Countable income	=	_____	

**Step Three:** Compare the total countable income to the **current SSI or SA** income limit. If less than the **current SSI or SA** income limit, the person is COLA **Pass-along** eligible, from the standpoint of income, for Medicaid benefits. (The person must still satisfy separate Medicaid resource and non-financial requirements.)