



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**

JOSH STEIN • Governor  
DEVPUTTA SANGVAI • Secretary  
CARLA WEST • Division Director, Human Services

## CHANGE NOTICE FOR MANUALS

**DATE:** June 02, 2026

**MANUALS:** State/County Special Assistance (SA) Manual and Special Assistance In Home (SAIH) Manual

**TO:** County Directors of Social Services

**CHANGE NOTICE:** EFS-SA-CN-02-2026

**SUBJECT:** Policy Updates and Deletions

**EFFECTIVE:** June 02, 2026

### I. BACKGROUND

This letter addresses policy additions and deletions to Special Assistance program manuals, as well as additions to Special Assistance forms. Please be sure that Special Assistance program supervisors review all attached changes with their staff.

### II. POLICY CHANGES/UPDATES IN THE STATE/COUNTY SPECIAL ASSISTANCE MANUAL

SA-3100 Eligibility Requirements	
SA-3100 I.	Added to policy for clarification: "To be eligible for SA, an individual must be eligible for SSI, or ineligible for SSI solely due to <b>being over</b> income <b>for SSI.</b> "
SA-3100 II.A.	Added to policy for clarification: "Receive SSI or are financially ineligible for SSI solely due to <b>being over</b> income <b>for SSI.</b> "
SA-3100 VII.A.3.e.	Added "family care homes" to list of terms that indicate Domiciliary care.

**NC DEPARTMENT OF HEALTH AND HUMAN SERVICES • DIVISION OF SOCIAL SERVICES**

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SA-3110 Application Process	
SA-3110 II.B.2.a.	Policy added to clarify what kinds of <b>signatures</b> are acceptable to use on any designation of authorized representative or release of information form received for use by the Special Assistance program.
SA-3110 V.H.	Added to policy for clarification: "...to be eligible for SA an individual must apply and be eligible for SSI or be found ineligible for SSI solely due to <b>being over</b> income <b>for SSI.</b> "
SA-3110 V.K.	Added to policy for clarification: "This is because in order to qualify for SA an individual must be eligible for SSI or ineligible solely due to <b>being over</b> income <b>for SSI.</b> "
SA-3110 VII.B.4.	Added to policy for clarification: "To reapply for SSI/RSDI by the SA application processing deadline if the applicant was previously denied SSI/RSDI <b>for not being disabled, and is not in appeal status and the appeal time frame has lapsed.</b> "
SA-3110 VII.B.4.	Removes "for a reason other than excess income" and adds "for not being disabled".
SA-3110 VII.B.5.	Adds policy to clarify "To reapply for SSI/RSDI by the SA application processing deadline if the applicant was previously denied SSI/RSDI, the applicant's income is below the FBR limit, and applicant is not in appeal status and the appeal time frame has lapsed."
SA-3110 VIII.A.4.	Added to policy for clarification: "Receives SSI or is ineligible for SSI solely due to <b>having</b> excess income <b>for SSI.</b> "

SA-3200 Resources	
SA-3200 V.B.1.a.	Policy added to clarify "Do not mark a resource or portion of a resource as excluded for burial without the a/b's full awareness, understanding of responsibility, and agreement."
SA-3200 V.B.1.d.(4)	Policy added that states "Document any liquid resources designated as a burial asset on the <i>DSS-0035 Special Assistance Burial Exclusion Designation Form</i> , and file the form in the a/b's case in NC FAST."
SA-3200 V.B.2.	Policy added that states "Document all designated burial exclusion funds on the <i>DSS-0035 Special Assistance Burial Exclusion Designation Form</i> , and file the form in the a/b's case in NC FAST. <b>Remember:</b> Do not mark a resource or portion of a resource as excluded for burial without the a/b's full awareness, understanding of responsibility, and agreement."
SA-3200 V.B.4.f.(1)	Policy added that states "Document the designated funds on the <i>DSS-0035 Special Assistance Burial Exclusion Designation Form</i> , and file the form in the a/b's case in NC FAST."
SA-3200 V.B.5.c.	Policy added that states "Document the designated funds on the <i>DSS-0035 Special Assistance Burial Exclusion Designation Form</i> , and file the form in the a/b's case in NC FAST."
SA-3200 V.B.6.a.	Policy added that states "Document the designated funds on the <i>DSS-0035 Special Assistance Burial Exclusion Designation Form</i> , and file the form in the a/b's case in NC FAST."

SA-3200 V.B.6.g.	Policy added that states “Document all changes to previously designated burial exclusion funds on the <i>DSS-0035 Special Assistance Burial Exclusion Designation Form</i> , and file the form in the a/b’s case in NC FAST.”
SA-3200 V.B.7.b.(5)(f)	Policy added that states “Document all designated burial exclusion funds on the <i>DSS-0035 Special Assistance Burial Exclusion Designation Form</i> , and file the form in the a/b’s case in NC FAST.”

**SA-3210 Income**

SA-3210 V.A.4.	“Exception to #4” removed from policy.
SA-3210 V.A.5.	<p>Clarifies removal of previous “Exception to #4” by removing references to SSI determinations of eligibility in SOLQ/SDX records that show a/b was found to be ineligible for SSI for “any reason other than excess income”. Policy now indicates “If a recent SSI determination of eligibility in the SOLQ/SDX records shows that the a/b was found to be ineligible for SSI and the a/b remains ineligible, the a/b is ineligible for SA. This is due to the SA eligibility requirement in SA-3100 I. which states, “To be eligible for SA, an individual must be eligible for SSI or ineligible for SSI solely due to <b>being over</b> income.”</p> <p>Also adds that “SA does not pend applications while waiting for the applicant to appeal their SSI/RSDI decision or for the appeal decision results.”</p>

**SA-3240 Citizenship and Identity**

SA-3240 II.B.5.b.	Removed reference to adding a printed screen with evidentiary evidence in the recipient’s “Permanent Verification folder” and added instruction to add the printed screen to the “a/b’s Citizenship/Identity Documentation file in NC FAST”.
SA-3240 II.B.5.c.	Removed II.B.5.c. from policy to instead include an updated version in II.B.6.
SA-3240 II.B.6.	Policy added to update that SAVE is to be used to verify authenticity of <b>non-citizen and naturalized citizen documentation</b> at all Special Assistance <b>applications, changes in immigration circumstances, and all redeterminations.</b>
SA-3240 II.B.7.a.	<p>Removed reference to adding documents or screen prints to evidence in the recipient’s “Permanent Verification folder” and added instruction to add the same to the “a/b’s Citizenship/Identity Documentation file in NC FAST”.</p> <p>Also added the following “Note”: As referenced in SA-3240 II.B.6. in this manual section, all non-citizens and naturalized citizens must have their immigration or Certificate of Naturalization status verified through the SAVE system at all Special Assistance applications, at immigration status changes, and at redeterminations.”</p>

SA-3240 II.B.7.b.	Removes reference to hierarchy code in EIS, and adds reference to hierarchy code in NC FAST.
SA-3240 II.C.1-5. Charts 1 - 5	Removes references to EIS.
SA-3240 III.B.2.a.(1) – (2)	POMS Manual reference added to direct user to additional information, if needed.
SA-3240 III.B.2.a.(3)	Refugee reference corrected to “alien” whose deportation is withheld under section 243(h) of the INA. Added to policy “(as in effect prior to April 1, 1997), or removal withheld as per section 241(b)(3)”. POMS Manual reference added to direct user to additional information, if needed.
SA-3240 III.B.2.a.(4) – (5)	POMS Manual reference added to direct user to additional information, if needed.
SA-3240 III.B.2.a.(6)	Added to policy for clarification, “...or in a status that is to be treated as a ‘Cuban/Haitian entrant’ for SSI purposes”. POMS Manual reference added to direct user to additional information, if needed.
SA-3240 III.B.2.a.(7)	POMS Manual reference added to direct user to additional information, if needed.  Added to policy “ <b>Exception:</b> Amerasians who enter as nonimmigrants, (e.g., foreign students pursuing studies in the U.S.), are not qualified aliens.”
SA-3240 III.B.2.a.	“IMPORTANT NOTE” added to policy clarifying that Citizens of Compact of Free Association (COFA) States are considered <i>permanent nonimmigrants</i> and <b>not</b> qualified aliens. As such, they are not eligible for SSI and thus <b>not eligible for Special Assistance</b> . **Users should note this policy differs from Medicaid policy.**
SA-3240 III.C.5.	Policy added to update that SAVE is to be used to verify authenticity of <b>non-citizen and naturalized citizen documentation</b> at all Special Assistance <b>applications, changes in immigration circumstances, and all redeterminations</b> .
SA-3240 III.C.7.	This policy was removed as it is already covered in nearby III.C.5.

SA-3310 Changes in Circumstance	
SA-3310 II.L.	Policy added to explain actions to take when a recent/current SSI applicant is found to be ineligible for SSI during the SA application process. This policy is not new. It is largely duplicative of policy in SA-3210 V. <i>SA Requirement to Obtain Maximum Entitlement Income</i> . It has also been located in <i>Changes In Circumstances</i> for user convenience.
SA-3310 III.P.	Policy added to explain actions to take when an SSI beneficiary is found to be ineligible. This policy is not new. It is largely duplicative of policy in SA-3210 V. <i>SA Requirement to Obtain Maximum Entitlement Income</i> . It has also been located in <i>Changes In Circumstances</i> for user convenience.

### III. SPECIFIC CHANGES IN THE SPECIAL ASSISTANCE IN HOME MANUAL

<b>SA-5250 Special Assistance In-Home (SAIH) and Transitions To Community Living (TCL)</b>	
SA-5250 III.	Updated policy to indicate that if the DSS receives a request for SAIH from the LME/MCO and needs to confirm housing slot eligibility for TCL, the DSS should now contact the Adult Services listserv.

<b>SA-5400 Eligibility For Other Benefits</b>	
SA-5400 III.	Updated the federal rule reference from 24 CFR, Section 5.609 (c)(8)(iii) to 24 CFR, Section 5.609 (b)(12)(ii).

### IV. SPECIAL ASSISTANCE FORM UPDATES/CHANGES

<b>New Program Form</b>	
<i>DSS-0035 Special Assistance Burial Exclusion Designation Form</i>	<p>This new, two page form is required to document an A/B's use of Burial Exclusion and guide the Economic Services caseworker to effectively explain key policy requirements to the A/B. This form is now referenced throughout SA-3200 V.B.</p> <p>The second page (<i>Amendment A</i>) is required to be used when obtaining an a/b's written statement as to whether they intend to use cash/funds in a bank account for burial expenses, as required by SA-3200 V.B.7.b.(2).</p>

### IV. IMPLEMENTATION INSTRUCTIONS

The included Special Assistance policy additions/updates are effective June 01, 2026.

Please contact your Continuous Quality Improvement Specialist (CQIS) team at [Specialassistance@dhhs.nc.gov](mailto:Specialassistance@dhhs.nc.gov) with any questions or concerns.

Sincerely,

Allison W. Smith, Deputy Director  
 Division of Social Services  
 Economic and Family Services

AWS