

North Carolina Department of Health and Human Services
North Carolina Medicaid
Division of Health Benefits
AGED, BLIND AND DISABLED MEDICAID MANUAL

MA-2110

PASS-ALONG

REVISED 05-12-2025 – CHANGE NO. 06-25

I. INTRODUCTION TO PASS-ALONG

To preserve Medicaid coverage for certain groups of individuals who lose **Supplemental Security Income (SSI) and/or Special Assistance (SA)**, Congress enacted special Medicaid eligibility provisions. These provisions require the State to continue to evaluate specified groups of former SSI and SA beneficiaries under categorically needy criteria. Qualified individuals are eligible for a disregard of certain **Retirement, Survivors, and Disability Insurance (RSDI)** benefits. This is called **Pass-along**. **Pass-along** only applies to **Private Living Arrangement (PLA)** budgeting and to Step I of **Long-Term Care (LTC)** budgeting.

A. Four Eligibility Groups for Pass-Along

1. There are four eligibility groups for Pass-along:
 - a. Cost of Living Allowance (COLA)/Pickle Amendment Group
 - b. Disabled Adult Children (DAC)
 - c. Early Widow(er)
 - d. Disabled Widow(er)
2. A former State/County Special Assistance beneficiary may also qualify for Pass-along in any of these four groups as long as the individual continues to reside in an Adult Care Home (ACH), even if they never received SSI.

B. Pass-along Eligibility

1. **An applicant**/beneficiary(a/b) need not claim Pass-along status. Many may not be able to remember when or if they received SSI or SA.
2. **Fully investigate** Pass-along eligibility in every case where the a/b is otherwise over income for Categorically Needy Medicaid Aged, Blind, Disabled (CN MAABD) because of income from Social Security.
3. Once an a/b is determined to be **Pass-along** eligible in one of the **four** groups, always consider **the a/b as Pass-along** in subsequent **recertifications** and applications unless one of the eligibility requirements for that **Pass-along** group changes.

C. Evaluating for Pass-along

When determining Pass-along eligibility, NC FAST will systematically screen for eligibility in all applicable Pass-along groups.

1. An a/b receiving Social Security as Widow(er)s or as Disabled Adult Children, are evaluated under Disabled Adult Children (DAC), Early Widow(er)s, or Disabled Widow(er)s (as applicable) before evaluation under COLA/ Pickle Amendment Group.
2. The caseworker must document whether or not the individual is Pass-along eligible, the SSI/SA termination date and resources used to verify Pass-along status in NC FAST.
3. Maintain a copy of the following completed forms:

a. DHB-5150A Pass-along Screening Guide

This form is completed when evaluating Pass-along groups of former Supplemental Security Income (SSI) and Special Assistance (SA) beneficiaries under categorically needy (C/N) criteria.

b. DHB-5150B Screening Guide for Medicaid Eligibility under the COLA Pass-along

This form is completed when determining if an a/b qualifies for COLA Pass-along status under the Pickle Amendment.

II. COLA **PASS-ALONG/ PICKLE AMENDMENT GROUP**

A. Eligibility Requirements

1. Currently receives RSDI (Social Security) benefits;
2. Was eligible for and received RSDI and either SSI or State/County SA concurrently for at least one month after April 1, 1977 (or is treated as having received them concurrently under **II.A.4.** below); and
3. Lost SSI or SA **benefits** for any reason but would currently be eligible if the total amount of all COLA **increases**, since losing SSI or SA benefits, were excluded from countable income.
4. An **a/b** who received SSI and then were found retroactively eligible for RSDI are considered to have received SSI and RSDI concurrently.
5. If **Pass-along** eligibility is based on prior receipt of SA (not SSI), the **a/b** must currently reside in an adult care home.

B. Verify **and Document an Applicant/Beneficiary (A/B) Who Lost SSI or SA Eligibility**

1. If an **a/b is** in assisted living/adult care home (ACH) the caseworker must:
 - a. Check all available sources including NC FAST case records and

- b. Determine if the **a/b** has received Special Assistance **currently or in the past**.
2. Use the following resources to identify if an a/b lost SSI or SA eligibility.

a. **STATE DATA EXCHANGE (SDX)**

- 1. The Medicaid Eligibility Code field indicates the eligibility status.
- 2. If the code is R, D, or W, the individual is ineligible for an SSI payment.

Refer to [NC FAST Help](#) job aid, Requesting and Viewing Online Data (OVS) to request SDX information in NC FAST.

Note: SDX will not show SSI terminations prior to 01-01-95. If an SSI termination may have occurred prior to that date, **contact the local [Social Security Administration](#) (SSA) office**.

b. **COLA Reports**

- i. Cola Reports are available in [NC FAST Help](#) and updated annually.
- ii. **Review** of COLA **Pass-along** eligibility based on these reports is required.
- iii. The reports **are leads** and may not identify all **Pass-along** eligible individuals.
- iv. SSI may have been terminated for a reason other than the COLA, but the individual may still be **Pass-along** eligible. Such persons will not appear on **these** reports.
- v. Refer to [MA-2940/ MA-3570](#), Social Security and Cost-of-Living Adjustment (COLA).

c. **SSI Termination/Alert Report and Ex-parte Review for SSI Termination Tasks**

- i. **SSI Reports and Tasks** are available in NC FAST.
- ii. It is the responsibility of the county to monitor termination of SSI benefits and evaluate individuals for all Medicaid programs.
- iii. Refer to [MA-1000](#), SSI Medicaid – Automated Process
- iv. Refer to in [NC FAST Help](#). Job aid, **SDX Overview, Tasks, and Work Queues**.

C. Verify and Document the Following Factors for Potential COLA Pass-along Eligibility

1. The applicant/beneficiary (a/b) statement.
2. The date SSI or SA benefits were terminated on or after April 1977.
3. The current amount of the applicant's/beneficiary's RSDI.
4. The amounts of all RSDI COLA increases the a/b received since SSI or SA was terminated.
5. If the a/b lost SSI due to receiving RSDI:
 - a. Use the factor found in the Pickle Amendment chart below.
 - b. Find the year in which the individual lost SSI and multiply the factor by the current RSDI amount.
 - c. Compare the result to the current SSI Federal Benefit Rate (FBR) to determine eligibility.
6. If the a/b lost SA due to RSDI benefit increase:
 - a. Use the factor found in the Pickle Amendment chart below. Find the year in which the individual lost SA and multiply the factor by the current RSDI amount.
 - b. Compare the result to the current [Special Assistance](#) (SA) income standard to determine Medicaid eligibility. Beneficiary must reside in an ACH to be eligible.

Reference [Special Assistance policy](#) regarding income standards.
7. When an a/b's RSDI increase caused them to
 - a. Lose SSI and become ineligible for Medicaid using Pass-along eligibility rules, and
 - b. The a/b is later determined to be eligible for SA and
 - c. The same a/b later loses SA benefits due to an RSDI increase,

the caseworker must determine which Pass-along group criteria should be used to evaluate for Pass-along eligibility and document the case record.

Example: The caseworker is completing a review for an a/b currently residing in an ACH. The a/b receives RSDI, and the most recent COLA increase resulted in the

a/b losing eligibility for SA. Prior to residing in the ACH, the a/b received SSI and RSDI for at least one concurrent month.

The caseworker must establish eligibility/ineligibility for Pass-along for both dates.

Lost SSI: 2015

- The caseworker multiplies the a/b's current RSDI by the 2015 factor in the chart below, however the resulting amount exceeds the current SSI income standard, therefore the a/b is not eligible for Medicaid due to Pass-along for losing SSI.

Lost SA: 2021

- The caseworker multiplies the a/b's current RSDI by the 2021 factor in the chart below. If the resulting amount is below the current SA income standard, the a/b remains eligible for Medicaid because they continue to live in an ACH.

Note: Contact the local [Social Security Administration \(SSA\)](#) Office **when** unable to verify benefits using BENDEX, SDX, SOLQ, case record or SSA **Benefit Verification** letter.

E. When the A/B is determined COLA Pass-along eligible:

1. Disregard any COLA **increases** received after SSI or SA was terminated for any reason from the current RSDI income for the a/b.
2. If there is a financially responsible person (spouse or parent) who receives RSDI benefits, also disregard all COLA **increases** received by that person since the a/b was terminated from SSI or SA.
3. The result is the countable RSDI income.
4. Refer to the current **Pickle Amendment Chart** below for assistance in deducting all RSDI COLA **increases** received **by the a/b and/or financially responsible person** since the last month in which **the a/b** was eligible for both RSDI and SSI or RSDI and SA **concurrently**.

F. Determine Countable Income

Add the countable RSDI Income to other countable earned and unearned income **then** compare it to the current SSI or SA income limit. (Use the 1/3 reduced income limit if appropriate. **Refer to [MA-2261](#) 1/3 Reduction**)

1. If the countable income is below the current SSI or SA income limit, continue to evaluate as categorically needy.

The SA level of care the person was in when they lost their SA will determine the maintenance amount for Medicaid Pass-along (SA Basic or Special Care Unit (SCU))

2. If the countable income is above the current SSI or SA income limit, the individual is not eligible for COLA Pass-along.
 - a. **DO NOT** disregard COLA. This person is ineligible under COLA Pass-along.
 - b. If ineligible for COLA Pass-along,
 1. Count the a/b and financially responsible person's current RSDI income
 2. Document in NC Fast and
 3. Send the appropriate notice(s).

EXAMPLE : (COLA Pass-along) Applicant/Beneficiary (a/b), age 55, lives alone in their own home with countable assets less than \$2,000. The a/b receives countable RSDI benefits in the amount of \$1,280 (\$1,300 minus \$20 disregard) a month in 2025, which is over the Categorically Needy income limit for Medicaid of \$1255 a month.

A/B was informed by local agency that they have a large Medicaid deductible they must meet prior to Medicaid authorization.

A/B applied for RSDI and SSI in October 1985, alleging disability beginning October 1984 and was approved for disability in October 1986, as of the alleged onset date. A/B was initially paid SSI for October 1985 through December 1986 under SSA normal procedures (in order to provide Medicaid eligibility).

A/B received their first RSDI check in December 1986, which caused SSI to terminate at the end of December 1986. They also received retroactive RSDI benefits during the same time period which were reduced by the amount of SSI received. The regular RSDI monthly payment exceeded the income limit for SSI.

Disregard RSDI COLA increases since the 1986 SSI termination.

\$ 1,300	(a/b's RSDI)
<u>x 0.347</u>	(percentage from Pickle Chart below)
\$451	
<u>- \$20</u>	(disregard)
\$431	(under the <u>2025</u> SSI income limit)

The a/b is Medicaid eligible based on COLA Pass-along (but not SSI eligible).

EXAMPLE: (COLA Pass-along couple) An applicant lives at home with their 75-year-old spouse who receives RSDI retirement of \$1100/month. The spouse has never received SSI.

The applicant is age 70 and receives \$785/month in RSDI benefits. (Both figures include Medicare premiums). Their countable joint income of \$1865 (\$1885 minus \$20 disregard) is over the MAA categorically needy income limit for couples of \$1,704.

The applicant received both RSDI and SSI concurrently until 1991 when the couple got married. This caused the applicant to be ineligible for SSI beginning in 1991 based on their combined income.

Disregard the couple’s COLA increases since the applicants SSI terminated.

\$1100	(spouse RSDI - including Medicare premiums)
+ \$785	(applicant RSDI - including Medicare premiums)
<u>\$1885</u>	
x .0.521	(percentage from chart in II. F. below)
\$794	(round down to \$794)
<u>- \$20</u>	(disregard)
\$774	(under the 2025 SSI couple income limit of \$1450)

The applicant, but not the spouse, is eligible for Medicaid under the COLA Pass-along because the applicant received SSI. The spouse has never received SSI.

EXAMPLE: (COLA Pass-along couple; both prior SSI) A married couple (Beneficiary1 and Beneficiary2) live together in their home and have total assets of less than \$3,000. Both beneficiaries’ SSI have terminated.

Beneficiary1 is 39 years old, and SSI terminated on 12/2013. They began receiving \$1,130/month in RSDI on 12/2013.

50-year-old Beneficiary2 currently receives \$50/month in private pension and began receiving Social Security Disability payments of \$946 as of 1/2006. Beneficiary2 SSI terminated on 12/2005.

<u>Beneficiary 1</u>		<u>Beneficiary 2</u>	
\$1130	(RSDI)	\$946	(Disability payment)
x .735	(Percentage from chart in II. F. below)	x .624	(Percentage from chart in II. F. below)
\$831	830.55 (round up to 831)	\$590	(\$590.30 round down)
<u>-\$20</u>	(Disregard)	+ 50	(Private pension)
\$811		<u>- \$20</u>	(Disregard)
		\$620	
B1 Total Countable Income		\$811	
B2 Total Countable Income		<u>+\$620</u>	
Married Couple’s Total Countable Income		\$1,431	

Disregard couple's total increases since SSI terminated. The total countable income is under the 2025 SSI couple's income limit of \$1450. Beneficiary1 and Beneficiary2 are eligible under Cola Pass-along.

G. Reduction Factors for Calculating Medicaid Eligibility Under the Pickle Amendment During 2025

If the last month in which a person received SSI while, or immediately prior to, receiving **RSDI** was in any of the periods in the chart below, multiply the present amount of **their** RSDI by the corresponding factor **in the chart below**, to obtain the current countable COLA Pass-along income.

Compare the current countable COLA Pass-along income to the SSI Federal Benefit Rate (FBR). If it is below FBR the a/b may be eligible for COLA Pass-along.

Note: As of January 1, 2025, the FBR is \$967.00 per month for an individual and \$1,450 per month for a couple. Refer to [MA-2940](#), Social Security and Cost-of-Living Adjustment (COLA).

Pickle Amendment Chart (2025)
(If SSI terminated, Multiply 2025 RSDI income by:)

<i>If SSI was last received during this period:</i>	<i>Multiply 2025 OASDI income by:³</i>	<i>If SSI was terminated during this period:</i>	<i>Multiply 2025 OASDI income by:³</i>	<i>If SSI was last received during this period:</i>	<i>Multiply 2025 OASDI income by:³</i>	<i>If SSI was last received during this period:</i>	<i>Multiply 2025 OASDI income by:³</i>
May - June 1977	0.186	Jan 1991 - Dec 1991	0.421	Jan 2005 - Dec 2005	0.599	Jan 2022 - Dec. 2022	0.870
July 1977 - June 1978	0.197	Jan 1992 - Dec 1992	0.437	Jan 2006 - Dec 2006	0.624	Jan 2023 - Dec. 2023	0.945
July 1978 - June 1979	0.210	Jan 1993 - Dec 1993	0.450	Jan 2007 - Dec 2007	0.644	Jan 2024 - Dec. 2024	0.976
July 1979 - June 1980	0.230	Jan 1994 - Dec 1994	0.461	Jan 2008 - Dec 2008	0.659		
July 1980 - June 1981	0.263	Jan 1995 - Dec 1995	0.474	Jan 2009 - Dec 2011	0.697		
July 1981 - June 1982	0.293	Jan 1996 - Dec 1996	0.487	Jan 2012 - Dec 2012	0.723		
July 1982 - Dec 1983	0.315	Jan 1997 - Dec 1997	0.501	Jan 2013 - Dec 2013	0.735		
Jan 1984 - Dec 1984	0.326	Jan 1998 - Dec 1998	0.511	Jan 2014 - Dec 2014	0.746		
Jan 1985 - Dec 1985	0.337	Jan 1999 - Dec 1999	0.518	Jan 2015 - Dec 2016	0.759		
Jan 1986 - Dec 1986	0.347	Jan 2000 - Dec 2000	0.531	Jan 2017 - Dec 2017	0.761		
Jan 1987 - Dec 1987	0.352	Jan 2001 - Dec 2001	0.549	Jan 2018 - Dec 2018	0.776		
Jan 1988 - Dec 1988	0.367	Jan 2002 - Dec 2002	0.564	Jan 2019 - Dec 2019	0.798		
Jan 1989 - Dec 1989	0.381	Jan 2003 - Dec 2003	0.571	Jan 2020- Dec 2020	0.811		
Jan 1990 - Dec 1990	0.399	Jan 2004 - Dec 2004	0.583	Jan 2021- Dec 2021	0.821		

***OASDI also known as RSDI**

H. Recertifications

At subsequent **recertifications**, determine if the individual still qualifies as **Pass-along**. Evaluate the income of the beneficiary. If countable income after deducting COLA results in ineligibility for SSI or SA, the individual is no longer eligible as COLA **Pass-along**. Evaluate under other **Pass-along groups and all Medicaid programs**.

III. DISABLED ADULT CHILD (DAC) PASS-ALONG

A. Eligibility Requirements

1. Currently entitled to and receives RSDI benefits as a DAC on a parent's record due to the retirement, death, or disability of a parent);
2. Has blindness or a disability which began before age 22 (RSDI benefits did not have to begin prior to age 22);
3. Lost SSI or SA due to receipt of or increases in the RSDI benefit; and
4. Would currently be eligible for SSI or SA if you disregard the current RSDI benefit.
5. If DAC **Pass-along** eligibility is based on former receipt of SA (not SSI), the individual must currently reside in an adult care home.

B. Identify Individuals Who Lost SSI or SA Eligibility Due to Receipt of DAC RSDI Benefits.

Applicants/beneficiaries need not claim **Pass-along** status. Many individuals may not be able to remember when or if they received SSI or **SA**.

1. Fully investigate **Pass-along** eligibility in every case where the individual is otherwise over income for **Categorically Needy-Medicaid Disabled (CN MAD)** because of income from Social Security.
2. Use the following resources to identify individuals who lost SSI or SA eligibility:
 - a. SDX - The Medicaid Eligibility Code field indicates an eligibility status code of "D" for a Disabled Adult Child.
 - i. Refer to [NC FAST Help](#) job aid, **Requesting and Viewing Online Data (OVS) to request SDX information in NC FAST.**
 - ii. SDX will not show SSI terminations prior to 01-01-95. If an SSI termination may have occurred prior to that date, **contact SSA.**
 - b. **SSI Termination/Alert Report and Ex-Parte Review for SSI Termination tasks are available in NC FAST.**
 - i. It is the responsibility of the county to monitor termination of SSI benefits and evaluate individuals for all Medicaid programs.
 - ii. Refer to [MA-1000](#), SSI Medicaid – Automated Process
 - iii. Refer to [NC FAST Help](#) job aid, SDX Overview, Tasks, and Work Queues.

- c. For individuals receiving RSDI DAC benefits who may have lost SSI prior to January 1, 1995, verify through the case record or the local Social Security Office.

The Social Security Claim Number suffix is “C” if the a/b receives as a disabled adult child. However, children other than DAC’s can also have a “C” suffix.

- d. Individuals in assisted living/ACH who may have been terminated from Special Assistance.

C. Verify DAC **Pass-along** Eligibility Factors.

1. The date SSI or SA benefits were terminated.
2. The current amount of the a/b’s RSDI disabled adult child benefit.

D. DAC Eligibility

If the Individual is **DAC Pass-along** Eligible Disregard all the Current RSDI Income.

E. Determine Countable Income

Compare other countable earned and unearned income to the current SSI or SA income limit. (Use the 1/3 reduced income limit if appropriate. Refer to [MA-2261](#) 1/3 Reduction).

1. If the countable income does not exceed the current [SSI](#) or [SA](#) income limit, continue to evaluate as categorically needy **and determine** eligibility without counting RSDI. The person is eligible under **DAC Pass-along**.
2. If the countable income is above the current SSI or SA income limit, determine eligibility counting RSDI benefits.
 - a. **DO NOT** disregard the RSDI income. This person is ineligible under **DAC Pass-along**.
 - b. If ineligible, count the current RSDI income and document **in NC Fast**.
 - c. Evaluate for all Pass-along groups and Medicaid programs.
 - d. The SA level of care the person was in when they lost their SA will determine the maintenance amount for Medicaid pass-along (SA Basic or SCU)

EXAMPLE 5: (DAC **Pass-along**) **Beneficiary** is an adult, living alone at home who receives RSDI benefits on the record of **their** deceased father based on **the beneficiary’s** disability, which began before they were age 22.

This beneficiary currently has no assets. The amount of their RSDI benefit is \$1,200. They also receive a private pension of \$500 per month and received SSI until the beneficiary's father died in 1995. Their SSI then stopped because of receipt of RSDI benefits.

\$1,200	(beneficiary's RSDI)
+ \$500	(private pension)
\$1700	(total gross income)
- \$1200	(disregard total RSDI)
\$500	
- \$20	(disregard)
\$480	(countable income is under the current SSI limit)

SDX in OVS shows status as "D." The beneficiary is eligible for CN MAD under the DAC Pass-along

F. Recertifications

At subsequent recertifications, determine if the individual still qualifies as Pass-along. Evaluate the income of the beneficiary. If the individual would be ineligible for SSI or SA under current income standards even after deducting the entire current RSDI benefit, the individual is no longer eligible as DAC Pass-along. Evaluate under other Pass-along groups and all Medicaid programs.

IV. EARLY WIDOW(ER)'S PASS-ALONG (INCLUDING SOME SURVIVING, DIVORCED SPOUSES) NOT RECEIVING MEDICARE

A. Eligibility Requirements

1. Lost SSI or SA benefits due to receipt of RSDI benefits;
2. Not yet eligible for Medicare Part A;
3. At least age 50, but not yet attained age 65; and
4. Would currently be eligible for SSI or SA benefits if they were not receiving RSDI benefits.
5. If Pass-along eligibility is based on prior receipt of SA (not SSI), the individual must currently reside in an adult care home.

B. Identify Individuals Potentially Eligible as Early Widow(er)'s Pass-along (Not Receiving Medicare)

Applicants/beneficiaries need not claim Pass-along status. Many individuals may not be able to remember when or if they received SSI or SA. Fully investigate Pass-along eligibility in every case where the individual is otherwise over income for CN MAD because of income from Social Security.

1. Use the following resources to identify individuals who lost SSI or SA eligibility:
 - a. SDX - The Medicaid Eligibility Code field indicates the eligibility status of “W” for a widow(er).
 - b. Refer to [NC FAST Help](#) job aid, Requesting and Viewing Online Data (OVS) to request SDX information in NC FAST.
 - c. SDX will not show SSI terminations that occurred prior to 01-01-95. If an SSI termination may have occurred prior to that date, **contact** SSA.
 - d. SSI Termination/Alert Report and Ex-parte Review for SSI Termination Tasks are available in NC FAST.
 - i. It is the responsibility of the county to monitor terminations of SSI benefits and evaluate individuals for all Medicaid programs.
 - ii. Refer to [MA-1000](#), SSI Medicaid-Automated Process
 - iii. Refer to [NC FAST Help](#) Job Aid, SDX Overview, Tasks, and Work Queues.
 - e. Verify status by the case record or through the local SSA.
 - f. Individuals in adult care homes who may have been terminated from Special Assistance.

C. Verify Early Widow(er)’s **Pass-along Eligibility Factors.**

1. The current amount of the a/b’s RSDI benefit.
2. The a/b’s current ineligibility for Medicare Part A.

D. Early Widow(er)’s Pass-along Eligible

If the Individual is determined Early Widow(er)’s **Pass-along** Eligible, Disregard All the RSDI Income.

E. Determine Countable Income

Compare other countable earned and unearned income to the current SSI or SA Income Limit. (Use the 1/3 reduced income limit if appropriate. Refer to [MA-2261](#) 1/3 Reduction)

1. If the countable income does not exceed the current SSI or SA income limit, determine eligibility excluding RSDI benefits. This person is eligible under **Early Widow(er)’s Pass-along**.
2. If the countable income is above the current SSI or SA income limit, the individual is not entitled to **Pass-along**.

- a. **DO NOT** disregard the RSDI income. This person is ineligible under **Early Widow(er)'s Pass-along**.
- b. If ineligible, count the current RSDI income and document in NC FAST.
- c. **Evaluate under other Pass-along groups and all Medicaid programs.**
- d. **The SA level of care the person was in when they lost their SA will determine the maintenance amount for Medicaid pass-along (SA Basic or SCU)**

EXAMPLE: (Early Widow(er)'s Pass-along) The applicant is 58 years old, lives at home alone and has assets worth less than \$2,000.

The applicant receives countable RSDI widow's benefits of \$1280 (\$1300 minus \$20 disregard) a month in 2024, which is over the Categorically Needy income limit for Medicaid. They also received SSI disability benefits beginning in 2019 until their spouse died in 2022, and the applicant became eligible for widow's benefits. The individual doesn't receive Medicare.

Disregarding the applicant's entire Social Security payment would make them eligible for SSI under current rules.

\$1280	(widow(er)'s benefit)
<u>-\$1280</u>	(disregard total Widow's benefit)
0	
<u>-\$20</u>	(disregard)
0	(countable income is under the current SSI limit)

The applicant is eligible for CN MAD under the **Widow(er)'s Pass-along**.

F. Recertifications

At subsequent **recertifications**, determine if the individual still qualifies as **Pass-along**. Evaluate the income of the beneficiary. If the individual would be ineligible for SSI or SA after disregarding the RSDI income, the individual is no longer eligible as **Early Widow(er)'s Pass-along**. **Evaluate under other Pass-along groups and all Medicaid programs.**

V. DISABLED WIDOW(ER)'S PASS-ALONG (INCLUDING SOME UNMARRIED, DIVORCED SPOUSES) WHO LOST SSI IN 1984

A. Eligibility Requirements

1. Be disabled (or were determined disabled by SSA until age 65).
2. Have received SSI or SA benefits in December 1983 but lost eligibility in January 1984 due to a statutory elimination of an additional benefit reduction factor for

widow(er)s before age 60 who were entitled to widow(er)s benefits based on disability since January 1984.

3. Would currently be eligible for SSI or SA except for the receipt of RSDI benefits.
4. If **Pass-along** eligibility is based on former receipt of SA, the individual must currently reside in an adult care home.

B. Identify Individuals Who Lost SSI Eligibility.

Applicant/beneficiaries need not claim **Pass-along** status. Many individuals may not be able to remember when or if they received SSI or SA.

Fully investigate **Pass-along** eligibility in every case where the individual is otherwise over income for CN MAD because of income from Social Security.

Use the following resources to identify individuals who lost SSI or SA eligibility:

1. The RSDI Claim number suffix will be “D” or “W” if the a/b receives as a disabled widow(er)/surviving divorced spouse.
2. SDX - The Medicaid Eligibility Code field indicates the eligibility status of “W” for a widow(er).
3. SSI Termination/Alert Report is available in NC FAST.
 - i. It is the responsibility of the county to monitor terminations of SSI benefits and evaluate individuals for all Medicaid programs.
 - ii. Refer to MA-1000, SSI Medicaid-Automated Process
 - iii. Refer to NC FAST Help Job Aid, SDX Overview, Tasks, and Work Queues.
4. For individuals receiving as a Disabled Widow(er) prior to January 1, 1995, verify status by the case record or through SSA.

C. Verify Disabled Widow(er)’s Eligibility Factors.

1. The date SSI benefits were terminated.
2. The current amount of the a/b’s RSDI Disabled Widow benefit.

D. Disabled Widow(er)’s Eligibility

If the Individual is **determined Disabled Widow(er)’s Pass-along** Eligible, Disregard All the RSDI Income.

E. Determine Countable Income

Compare other countable earned and unearned income to the current SSI or SA income limit. (Use the 1/3 reduced income limit if appropriate.)

1. If the countable income does not exceed the current SSI or SA income limit, determine eligibility excluding RSDI benefits. This person is eligible under **Disabled Widow(er)'s Pass-along**.
2. If the countable income **exceeds** the current SSI or SA income limit, the individual is not entitled to **Disabled Widow(er)'s Pass-along**.
 - a. **DO NOT** disregard the RSDI income. This person is ineligible under **Disabled Widow(er)'s Pass-along**.
 - b. If ineligible, count the current RSDI income and document in NC FAST.
 - c. Evaluate under other Pass-along groups and all Medicaid programs.
 - d. The SA level of care the person was in when they lost their SA will determine the maintenance amount for Medicaid pass-along (SA Basic or SCU)

EXAMPLE: (Disabled Widow(er)'s Pass-along) The applicant is a 60-year-old disabled widow who lives at home and has assets worth less than \$2,000.

In November 1983, the applicant began receiving SSI benefits. However, in January 1984 they lost those benefits due to a statutory elimination of an additional benefit reduction factor for widow(er)s before age 60 who were entitled to widow(er)s benefits based on disability.

They currently receive countable RSDI widow's benefits of \$1260 (\$1280 minus \$20 disregard) a month which is over the Categorically Needy income limit for Medicaid. The individual doesn't receive Medicare.

Disregarding the applicant's entire Social Security payment would make them eligible for SSI under current rules.

\$1,280	(widow(er)'s benefit)
-\$1,280	(disregard total Widow's benefit)
<u>-\$20</u>	(disregard)
0	(countable income is under the current SSI limit)

The applicant is eligible for CN MAD under the Widow(er)'s Pass-along.

F. RECERTIFICATIONS

At subsequent recertifications, determine if the individual still qualifies as **Pass-along**. Evaluate the income of the beneficiary. If the caseworker determines that the a/b is ineligible after evaluating other income, along with any Pass-along, the individual is no longer eligible as **Pass-along**. If ineligible, count the RSDI income. **Evaluate the a/b for all other MAGI and NON-MAGI Medicaid programs.**