I. REASONABLE COMPATIBILITY

Reasonable Compatibility refers to the standard used to compare the self-attested income/resources and income/resources as reported by an electronic data source. Reasonable Compatibility applies to all categorically needy programs and must be applied anytime there is a self-attestation and an electronic source for income/resources.

A. Reasonable Compatibility

Reasonable Compatibility is determined for each applicant/beneficiary (a/b) based on the total countable income/resources for their household. For income/resources to be considered reasonable compatible, all countable income/resources for the applicable household must meet the reasonable compatibility standard. Refer to MA-2250, Income to determine total countable income.

B. Requirements for Reasonable Compatibility

Reasonable compatibility cannot be used without self-attestation and an electronic source of all countable income/resources for each financially responsible household member. Self-attestation may be the a/b’s statement or information they provide.

C. Aged, Blind, and Disabled (ABD) Programs

Reasonable Compatibility does apply in Private Living Arrangement (PLA) budgeting for both resources and income except RSDI, see D.1 below.

D. Exceptions to Reasonable Compatibility

1. Reasonable Compatibility does not apply to Retirement, Survivors, Disability Insurance (RSDI) income.

   a. Always use the gross income provided by SOLQIS.

   b. Caseworkers must review RSDI evidence in NC FAST for all MAGI and non-MAGI cases.

   c. Caseworkers must manually update the a/b’s attestation evidence to reflect the gross RSDI income verified by SOLQIS.
d. Caseworkers must document the case to show that the evidence containing the a/b’s attestation of RSDI income was updated to the gross RSDI amount that has been verified electronically by SOLQIS.

2. Reasonable Compatibility does not apply when calculating the medically needy deductible or Patient Monthly Liability (PML). The caseworker must use actual gross income.

Reasonable compatibility does apply to resources when determining eligibility for applicable programs.

II. HOW TO DETERMINE REASONABLE COMPATIBILITY

An applicant’s self-attestation of income/resources is acceptable if it is reasonably compatible with the information received from electronic data source.

A. For income to be considered reasonably compatible:

1. Both the self-attestation and electronic data source must be at or below the applicable income/resource standard; or

2. Both the self-attestation and electronic data source must be above the applicable income/resource standard; or

3. Either the self-attestation or the electronic data source is above, and the other is below the applicable income/resource standard, and the difference between the two is within twenty percent (20%) of each other.

B. Reasonable compatibility at recertification:

Reasonable compatibility requires a current self-attestation and electronic source. At recertification, the caseworker must send a DHB-5097/DHB-5097sp, Request for Information, and request current income/resource attestation. Do not request attestation for RSDI income, see I.D above.

1. Enter the self-attested income/resource amount in NC FAST.

2. Manually determine if the self-attested income/resource is reasonably compatible with the electronic source income/resource.

3. Reasonable compatibility cannot be determined at recertification if there is no current self-attestation provided by the beneficiary and a current electronic source.

4. Follow the steps in sub-section D, below.
C. Automated vs. Manual RC

1. The system will automatically calculate reasonable compatibility for most applications.

2. The caseworker must manually determine reasonable compatibility for the following:
   a. The caseworker is approving a medical forced eligibility case
   b. At recertification or change of circumstance
   c. Anytime there is no current self-attestation and current electronic source evidence present on the evidence dashboard

3. When the system does not calculate reasonable compatibility, the caseworker will calculate the percentage difference when either the self-attestation or the electronic data source is above, and the other is below the applicable income/resource standard.

D. Steps to calculate the percentage of difference

To calculate the 20% difference:

1. Subtract the smaller number from the larger number to get the difference between the two.

2. Divide the difference by the smallest number, and round to two decimal places.

3. Multiply this amount by 100 to get the percentage difference between the two amounts.

4. Use the Reasonable Compatibility Calculator when manually determining reasonable compatibility to determine if the difference between the self-attestation and the electronic source is within the 20% limit.

5. A copy of the Reasonable Compatibility Calculator results should be maintained in the case file.
### E. Reasonable Compatibility Standard

See the chart on the following pages to determine what actions the caseworker should take after completing the reasonable compatibility comparison of self-attestation and electronic sources.

<table>
<thead>
<tr>
<th>Reasonable Compatibility Standard</th>
<th>Source of Income/Resource Used to Determine Eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Self-Attestation of Household Income/Resources</strong></td>
<td><strong>Electronic Data Source</strong></td>
</tr>
<tr>
<td>Self-Attestation of Household Income/Resources</td>
<td>Electronic Data Source</td>
</tr>
<tr>
<td>At or Below the Threshold for applicable household size</td>
<td>At or Below the Threshold for applicable household size</td>
</tr>
<tr>
<td>Self-Attestation of Household Income/Resources</td>
<td>Electronic Data Source</td>
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<tr>
<td>-----------------------------------------------</td>
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</tr>
<tr>
<td>Above Threshold for applicable household size</td>
<td>Above Threshold for applicable household size</td>
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<td>At or Below the threshold for applicable household size</td>
</tr>
<tr>
<td>No, if the self-attested amount is not within 20% of electronic source amount</td>
<td></td>
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</tbody>
</table>