

# DHHS ECONOMIC BENEFITS POLICY GOVERNANCE BOARD

Division of Aging and Adult Services

Change Notice 2016-07

## INTEGRATED ELIGIBILITY MANUAL (IEM)

**DATE:** July 26, 2016

**SUBJECT:** IEM—Special Assistance Changes  
Section 4030.2 Unearned Income  
Section 4100 Update: Special Assistance Requirement to Obtain Maximum Entitlement Income  
Section 16010.20 Establishing a Payee

**DISTRIBUTION:** County Directors of Social Services  
Special Assistance Program Supervisors  
Income Maintenance/Eligibility Program Managers

**EFFECTIVE:** August 1, 2016

### CONTENT OF CHANGE

The Division of Aging and Adult Services has revised and updated policy relating to Special Assistance in Section 4030.2 and 4100 of the Integrated Eligibility Manual (IEM.)

#### **A. Section 4030.2 Unearned Income**

Long term care insurance no longer counts as unearned income for Special Assistance.

#### **B. 4120 Evaluate Applicant's Beneficiary's SSI Status**

1. Removed 4120 B. as this paragraph is obsolete as it references cases and reports from EIS.
2. Added language to reinforce the policy that SA payments cannot make up for an SSI deficit except in certain circumstances.

#### **C. 4130: Instructions when the A/B is Receiving or has been Awarded SSI at the FBR.**

1. Added instructions relative to NC FAST.
2. Replaced 4130 C. to guide workers on where to find base period and earned income policy.

#### **D. 4140: Application Process when the SA Applicant is Not Receiving SSI at the FBR**

1. Eliminated redundant information in the opening paragraph.
2. Clarified the process and steps for the worker and added instructions for when the applicant has not applied for SSI at the FBR by the 45<sup>th</sup> or 60<sup>th</sup> day.
3. 4140 B.4.a. Removed the reference to SA beneficiaries approved for SA prior to December 1, 2009 who were denied SSI due to excess resources related to life insurance cash value when the face value of cash accruing policies was over \$1,500 but less than \$10,000. This is not applicable to new applicants.

**E. 4150: Benefit/Unearned Income Evidence Requirements for Cases with Total Gross Monthly Income Less than the FBR**

1. Added instructions and language relative to NC FAST.
2. 4150 A.—added that the IMC should track the time-limit for these case exceptions.
3. 4150 A.4. removed as this statement was repetitive.
4. 4150 C. Provided instructions for cases that had income less than the FBR due to life insurance cash value and had applied prior to December 2009.
5. 4150 E. states that the reason 'VA only or VA/other income only' is no longer valid.

F. Section 16010.21 has been deleted.

G. Section 16010.22 has been changed to reflect the language in NCAC 71P .0501.

Sincerely,

A handwritten signature in black ink, appearing to read "Joyce Massey-Smith". The signature is written in a cursive, flowing style.

Joyce Massey-Smith, Chief, Adult Services Section

JMS/cru