



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

ROY COOPER • Governor

KODY H. KINSLEY • Secretary

JOYCE MASSEY-SMITH • Director
Division of Aging and Adult Services

NC Division of Aging and Adult Services

CHANGE NO. DAAS_AS_01_2023
Manuals: State/County Special Assistance including Special Assistance In-Home

DATE: January 20, 2023

Manual: State/County Special Assistance and Special Assistance In-Home Manuals

Subject: Policy Additions and Updates

To: County Directors of Social Services
Adult Services Supervisors

Effective: Upon Receipt

I. BACKGROUND

- A.** Effective January 1, 2023, the following new Special Assistance rates are applicable for determining financial eligibility for State-County Special Assistance programs:
- the monthly Basic Rate shall be \$1,285.00, and the SA Basic Maintenance Amount shall be \$1,355.00
 - the monthly Enhanced Rate (previously known as SCU Rate) shall be \$1,647.00, and the SA Enhanced Maintenance Amount shall be \$1,717.00
- B.** Effective January 1, 2023, the monthly Enhanced Rate (previously known as the SCU Rate) may be received by **both**:
- Special Assistance beneficiaries in SCU facility care with a diagnosis of Alzheimer's Disease or dementia, verified by a valid FL-2,
- AND**
- SA/IH beneficiaries with a diagnosis of Alzheimer's Disease or dementia, verified by a valid FL-2.

SA/IH policy continues to require that applicants and beneficiaries have an FL- 2 indicating a need for licensed residential facility level of care signed by a licensed physician, physician assistant, or nurse practitioner.

- C.** Effective January 1, 2023, SA/IH applicants and beneficiaries are **no longer required** to be Medicaid eligible. When approved for SA/IH, beneficiaries are automatically eligible

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES • DIVISION OF AGING AND ADULT SERVICES

LOCATION: 693 Palmer Drive, Taylor Hall, Raleigh, NC 27603
MAILING ADDRESS: 2101 Mail Service Center, Raleigh, NC 27699-2101
www.ncdhhs.gov • TEL: 919-855-3400 • FAX: 919-733-0443

AN EQUAL OPPORTUNITY / AFFIRMATIVE ACTION EMPLOYER

for non-SSI Medicaid, just like beneficiaries approved for Special Assistance in facilities.

- D. The Special Assistance and Special Assistance In-Home Manuals are being reissued in their entirety to reflect policy additions and policy updates.

SPECIAL NOTE:

There may be further guidance issued in coming weeks regarding Special Assistance In-Home policy related to the assignment of an SA In-Home payment that is less than the maximum allowable payment (based on the assessment and service plan completed by an adult services case manager.) The policy areas of potential, future change are marked in *italic font* and highlighted in yellow on the attached revised version of the Special Assistance In-Home Program manual.

The manual policy section changes for A. through D. are listed below.

II. CONTENT AND IMPLEMENTATION OF CHANGE

A. SA-3100 Eligibility Requirements

1. Section I.

- Adds new policy regarding SA/IH beneficiaries being automatically eligible for Medicaid.

2. Section VII.

- Adds wording: to receive SA “in an adult care home or for Special Assistance In-Home,” the a/b must have a valid Adult Care Home FL-2.

3. Section VII A. 7.

- Adds new policy regarding assignment of the correct *Level of Care Type* in Level of Care evidence in NC FAST to ensure appropriate rate is used in budgeting.

4. Section VII. C.

- Updates policy to define what the Enhanced Rate is and how it applies to Special Care Unit payments

5. Section VII. D.

- Adds new policy regarding the requirements for Enhanced Rate payments that are now available for SA/IH beneficiaries with a diagnosis of Alzheimer’s Disease or dementia.

B. SA-3110 Application Process

Section V. C.

- Adds new policy that Special Assistance In-Home eligibility automatically qualifies the SA/IH applicant for Medicaid for non-SSI recipients.

C. SA-3220 Budgeting Principles

1. Section I.

- Adds new policy identifying the Enhanced Rate as being for individuals in Special Care Units (SCU) or individuals in in-home living arrangements with a diagnosis of Alzheimer's disease or dementia.

2. Section II.A.

- Updates policy to identify the new SA Basic rate amount, effective January 1, 2023.
- Note added regarding the assignment of the correct SA rate in NC FAST requiring the correct selection of *Level of Care Type* in Level of Care evidence.

3. Section II.B.

- Adds new policy identifying the Enhanced Rate as being for individuals in Special Care Units (SCU) or individuals in in-home living arrangements with a diagnosis of Alzheimer's disease or dementia.
- Adds new policy regarding the SA Enhanced rate amount, effective January 1, 2023

4. Section II.D.

- Updates budgeting examples to include new SA Basic and SA Enhanced rates.

5. Section II.E.

- Removes prior income test/limits of \$1,228 for SA and \$1,561 for SCU.
- Updates income limits based on new SA Basic and SA Enhanced rates and maintenance amounts.

6. Section III.A.

- Removes prior income test/limits of \$1,228 for SA and \$1,561 for SCU.

7. Section III.B.

- Updates budgeting examples to include new SA Basic and SA Enhanced rates.

8. Section III.C.

- Updates policy to identify when an individual is ineligible for SA due to income.

9. Section IV.

- Updates policy and budgeting examples throughout section to identify and include new SA Basic and SA Enhanced rates.

10. Section V.

- Updates policy and budgeting examples throughout section to identify and include new SA Basic and SA Enhanced rates.
- Corrects outline lettering/numbering issue.

11. Section VI.

- Updates policy and budgeting examples throughout section to identify and include new SA Basic and SA Enhanced rates.

D. SA-3310 Changes in Circumstance

Sections II. and III.

- Updated policy in each section to remove references to an “SCU rate” and replace with the “Enhanced rate”.

E. SA-5000 Introduction to Special Assistance In Home (SA/IH) Program

Section II.

- Removes previous requirement for individuals to be eligible for full Medicaid under Medicaid categorically needy guidelines.

F. SA-5100 Intake, Referral and Time Frames

1. Section I.

- Adds new policy that effective January 1, 2023, SA/IH beneficiaries are automatically eligible for Medicaid.

2. Section III.A.

- Added wording to include that the application processing time frame for SA/IH is the same as it is for “SA facility applications”.

G. SA-5200 Eligibility Requirements

1. Changes throughout the section to remove prior policy that SA/IH a/b’s must be eligible for Medicaid under Medicaid categorically needy (CN) requirements.

2. Changes throughout section to add new policy that SA/IH beneficiaries are now automatically eligible for Medicaid.

3. Section I.B.

- Removes previous policy identifying SA/IH and the Medicaid federal poverty guideline income limit exceptions

4. Section II.

- Adds new policy directing IMC to examine the FL-2 for validity, and examine the Diagnosis section of the FL-2 to determine if there is a diagnosis of Alzheimer’s disease or dementia for SA/IH a/b’s.
- Adds new policy to identify when to apply the SA Basic rate and the SA Enhanced rate for SA/IH a/b’s.
- Note added regarding the assignment of the correct SA rate in NC FAST requiring the correct selection of *Level of Care Type* in Level of Care evidence.

5. Section VI.

- Changes throughout the section to remove prior policy that SA/IH a/b's must be eligible for Medicaid under Medicaid categorically needy (CN) requirements.
- Adds new policy that SA/IH beneficiaries are now automatically eligible for Medicaid.

H. SA-5250 Special Assistance In-Home (SA/IH) and Transitions to Community Living (TCL)

1. Section V.A.

- Adds new policy that effective January 1, 2023, SA/IH beneficiaries are automatically eligible for Medicaid.

2. Section VII.B.

- Removes previous policy requiring that, for non-active SA-ACH cases, the Medicaid county of origin should complete an interview with applicant or representative for SA/IH TCL applicants with an active Medicaid case.

3. Section VIII.A.2.e.

- Removes prior policy indicating that the Appendix E, Supplement 2 form should be used to communicate changes pertinent to the determination of Medicaid categorically needy eligibility.

4. Section VIII. C. and D.

- Removes all previous policy references indicating that a Medicaid categorically needy ex parte review is needed to determine continued Medicaid CN eligibility.

I. SA-5300 Calculation of Payments

1. Section II

- Adds new policy to explain the maximum SA Basic monthly payment and the maximum SA Enhanced monthly payment for the SA/IH program.

3. Section IV.A.

- Removes prior income test/limit of \$1,228 for SA/IH.
- Adds new policy indicating the new SA Basic Maintenance amount and the new SA Enhanced Maintenance amount.
- Updates budgeting example to include new Maintenance amounts.

4. Section IV.B.

- Removes prior income test/limit of \$1,228 for SA/IH.
- Adds new policy indicating maximum TCMI allowed to be eligible for SA/IH at the Basic rate and at the Enhanced rate.

5. Section IV.C.

- Updates budgeting examples to include new SA Basic and SA Enhanced rates.

J. SA-5400 Eligibility For Other Benefits

Removes Section VI. Medicaid.

K. DAAS Forms – Updates

1. DAAS-8190 SSI/Non-SSI Application Workbook

Updated to include removal of Medicaid CN question in I.D. Adds question identifying LME/MCO and date applicant confirmed to be on TCL housing list. Adds/updates Special Assistance Level of Care Types.

2. DAAS-8190 Attachment A for MCS

Updated to remove prior SA income test.

3. DAAS 2022-1 Special Assistance Recertification Budget Sheet

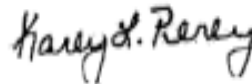
Updated to remove prior SA income test. Adds selections for new Level of Care Types, and adds new Basic and Enhanced rates and maintenance amounts.

III. MAINTENANCE OF MANUAL

The revised Special Assistance and Special Assistance In-Home Manuals are attached with all the revisions in red font, for your convenience. The final manuals are posted on the [Special Assistance section of our DHHS website](#) and on our [Special Assistance and Adult Services SharePoint site](#).

If you have any questions regarding this information, please contact the SA Listserv at specialassistance@dhhs.nc.gov.

Sincerely,



Karey Perez, Chief
Adult Services Section

KP/tg/wb