Implementation Guide: Medicaid State Plan Eligibility Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability

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Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability

POLICY CITATION

Statute: 1634; 1902(a)(17); 1902(f)

BACKGROUND

This reviewable unit (RU) describes states' eligibility determinations for individuals who qualify for Medicaid based on being age 65 years or older, or having blindness or a disability. This RU is not applicable to the territories.

States have three options with respect to the eligibility process and methodology used for individuals whose eligibility is based on being age 65 years or older, or having blindness or a disability, and which is not determined using MAGI-based methodologies. These options are:

- Section 1634 State: The state has an agreement under section 1634 of the Social Security Act for the Social Security Administration to determine Medicaid eligibility for supplemental security income (SSI) beneficiaries. For all other individuals who seek Medicaid eligibility on the basis of being age 65 or older, or having blindness or a disability, the state requires a separate Medicaid application and determines financial eligibility based on SSI income and resource methodologies.
- *SSI Criteria State*: The state requires all individuals who seek Medicaid eligibility on the basis of being age 65 or older, or having blindness or a disability, including SSI beneficiaries, to file a separate Medicaid application. The state determines financial eligibility based on SSI income and resource methodologies.
- 209(b) State: The state requires all individuals who seek Medicaid eligibility on the basis of being age 65 or older, or having blindness or a disability, including SSI beneficiaries, to file a separate Medicaid application. The state determines financial eligibility using income and resource methodologies more restrictive than SSI. These states may not use more restrictive standards than those in effect on January 1, 1972. In addition, the state must deduct incurred medical expenses, which are not covered under the state Medicaid plan, from an individual's income in determining income eligibility. The more restrictive methodologies established by a 209(b) state are described in the More Restrictive Requirements than SSI under 1902(f) (209(b) States) RU.

The eligibility groups displayed in the **Mandatory Eligibility Groups** RU and those available for selection in the **Optional Eligibility Groups** RU will be determined based on whether the state is a 1634 state, SSI criteria state, or 209(b) state. See the Reviewable Unit Dependencies section below for more information.

REVIEWABLE UNIT DEPENDENCIES

Many RUs in MACPro are dependent upon other RUs. Each time a primary RU is changed, there could be an effect on other, secondary RUs which are dependent on the primary. For example, in the **Mandatory Eligibility Groups** RU, there is a question as to whether the state covers the Adult Group. If **Yes** is selected, and if a box is checked to include the Adult Group in the submission package, then the **Adult Group** RU will be included by the system in the package and the user can navigate to it to complete it. If **No** is selected, the **Adult Group** RU will not be included in the package. In this example, the **Mandatory Eligibility Groups** RU is the **Primary RU** and the **Adult Group** RU is the **Secondary RU**. The **Adult Group** RU is considered to be dependent on selections made in the **Mandatory Eligibility Groups** RU.

Whenever a change in a primary RU may affect a secondary RU, you either need to revise the secondary RU (if it is already in the package) or add the secondary RU to the package so that it can be updated in the same submission package as the primary RU.

The following table explains the dependent relationships for the **Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability** RU.

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
Eligibility	Mandatory	Unless the Eligibility Determinations for	If the secondary RU will not display
Determinations of	Eligibility Groups	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or		Have Blindness of a Disability RU	approved in MACPro nor included in the
Older or Who Have		(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	 Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		Mandatory Eligibility Groups RU	Alternatively, remove the secondary
		(secondary) cannot be displayed.	RU from the package.

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Mandatory Eligibility Groups	The selection of 209(b) State, or SSI Criteria or 1634 State as the basis for the eligibility determination in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary) affects which eligibility groups are listed for selection in the Mandatory Eligibility Groups RU (secondary).	 You must complete, save and validate the primary RU before you can complete the secondary RU. Once the primary RU is approved in MACPro, it does not have to be included again in a submission package unless the basis changes, in which case the secondary RU also has to be included again.
Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Optional Eligibility Groups	Unless the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary) has either been approved in MACPro or is included, completed and validated in the submission package, the Optional Eligibility Groups RU (secondary) cannot be displayed.	 If the secondary RU will not display because the primary RU is neither approved in MACPro nor included in the package: Add the primary RU to the package, complete it and validate it. Alternatively, remove the secondary RU from the package.
Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Optional Eligibility Groups	The selection of 209(b) State, or SSI Criteria or 1634 State as the basis for the eligibility determination in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary) affects which eligibility groups are listed for selection in the Optional Eligibility Groups RU (secondary).	 You must complete, save and validate the primary RU before you can complete the secondary RU. Once the primary RU is approved in MACPro, it does not have to be included again in a submission package unless the basis for the eligibility determination in section A changes, in which case the secondary RU also has to be included again.

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
Eligibility	Adult Group	If 209 (b) State is selected in section A of	If you change your election in section
Determinations of		the Eligibility Determinations of	A of the primary RU from 209(b)
Individuals Age 65 or		Individuals Age 65 or Older or Who	State to Section 1634 State or SSI
Older or Who Have		Have Blindness or a Disability RU	Criteria State, you must include the
Blindness or a		(primary), the following text displays in	secondary RU in the same submission
Disability		the Adult Group RU: <i>Note: In 209(b)</i>	package, as this statement should no
		states, individuals receiving SSI or	longer display in the secondary RU.
		deemed to be receiving SSI who do not	The system will automatically remove
		qualify for mandatory Medicaid	the statement in the secondary RU
		eligibility due to more restrictive	after the primary RU is saved and
		requirements may qualify for this	validated.
		eligibility group if otherwise eligible.	
Eligibility	Eligibility	If 1634 State is selected in section A of	If 1634 State has been selected in the
Determinations of	Determinations and	the Eligibility Determinations of	primary RU and the secondary RU does
Individuals Age 65 or	Fair Hearings	Individuals Age 65 or Older or Who	not already indicate that the Social
Older or Who Have		Have Blindness or a Disability RU	Security Administration determines
Blindness or a		(primary), A.2.iii. of the Eligibility	eligibility for SSI beneficiaries, include
Disability		Determinations and Fair Hearings RU	the secondary RU in the package and
		(secondary) needs to be selected to	select A.2.iii.
		indicate that the Social Security	
		Administration determines eligibility for	
THE PLANT	N. MACI	SSI beneficiaries.	TC4 1 DIT '11 4 1' 1
Eligibility	Non-MAGI	Unless the Eligibility Determinations of	If the secondary RU will not display
Determinations of	Methodologies	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or		Have Blindness or a Disability RU	approved in MACPro nor included in the
Older or Who Have		(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	• Add the primary RU to the package,
Disability		validated in the submission package, the Non-MAGI Methodologies RU	complete it and validate it.
		(secondary) cannot be displayed.	Alternatively, remove the secondary PLI from the postupos
		(Secondary) cannot be disprayed.	RU from the package.

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Non-MAGI Methodologies	The selection of 209(b) State, or SSI Criteria or 1634 State as the basis for the eligibility determination in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary) affects the requirements displayed in section B of Non-MAGI Methodologies with respect to financial methodologies.	 You must complete, save and validate the primary RU before you can complete the secondary RU. Once the primary RU is approved in MACPro, it does not have to be included again in a submission package unless the basis changes, in which case the secondary RU also has to be included again.
Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Non-MAGI Methodologies	If 209(b) State is selected in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary), C.2. will display in Non-MAGI Methodologies regarding the option to apply more restrictive methodologies.	 If you change your election in section A of the primary RU from 209(b) State to 1634 State or SSI Criteria State, you must include the secondary RU in the same submission package so that the option can be removed from the secondary RU. The system will automatically remove the statement in the secondary RU after the primary RU is saved and validated.
Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Non-MAGI Methodologies	The selection of 209(b) State, or SSI Criteria or 1634 State as the basis for the eligibility determination in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary) affects the requirements displayed in section F of Non-MAGI Methodologies with respect to deductions from countable income in determining eligibility for the medically needy.	 You must complete, save and validate the primary RU before you can complete the secondary RU. Once the primary RU is approved in MACPro, it does not have to be included again in a submission package unless the basis changes, in which case the secondary RU also has to be included again.

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
Eligibility	Handling of Excess	Unless the Eligibility Determinations of	If the secondary RU will not display
Determinations of	Income	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or	(Spenddown)	Have Blindness or a Disability RU	approved in MACPro nor included in the
Older or Who Have		(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		Handling of Excess Income	Alternatively, remove the secondary
		(Spenddown) RU (secondary) cannot be	RU from the package.
		displayed.	1 0
Eligibility	Handling of Excess	If 1634 State or SSI Criteria State is	You must complete, save and validate
Determinations of	Income	selected in section A of the Eligibility	the primary RU before you can
Individuals Age 65 or	(Spenddown)	Determinations of Individuals Age 65	complete the secondary RU.
Older or Who Have		or Older or Who Have Blindness or a	Once the primary RU is approved in
Blindness or a		Disability RU (primary), the question at	MACPro, it does not have to be
Disability		A.2. of the Handling Excess Income	included again in a submission
		(Spenddown) RU (secondary) about	package unless the basis changes, in
		including the retroactive period in the	which case the secondary RU also has
		budget period will display.	to be included again.
Eligibility	Handling of Excess	The selection of <i>209(b) State</i> , or <i>SSI</i>	You must complete, save and validate
Determinations of	Income	Criteria or 1634 State as the basis for the	the primary RU before you can
Individuals Age 65 or	(Spenddown)	eligibility determination in section A of	complete the secondary RU.
Older or Who Have		the Eligibility Determinations of	Once the primary RU is approved in
Blindness or a		Individuals Age 65 or Older or Who	MACPro, it does not have to be
Disability		Have Blindness or a Disability RU	included again in a submission
		(primary) affects the requirements	package unless the basis changes, in
		displayed in section C of the Handling	which case the secondary RU also has
		Excess Income (Spenddown) RU	to be included again.
		(secondary) with respect to deductions for	
		incurred expenses.	

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
Eligibility	Handling of Excess	If 1634 State or SSI Criteria State is	You must complete, save and validate
Determinations of	Income	selected in section A of the Eligibility	the primary RU before you can
Individuals Age 65 or	(Spenddown)	Determinations of Individuals Age 65	complete the secondary RU.
Older or Who Have		or Older or Who Have Blindness or a	• Once the primary RU is approved in
Blindness or a		Disability RU (primary), an additional	MACPro, it does not have to be
Disability		option will display at E.3. of the	included again in a submission
		Handling Excess Income (Spenddown)	package unless the basis changes, in
		RU (secondary) about expenses incurred	which case the secondary RU also has
		earlier than the third month before the	to be included again.
		month of application.	_
Eligibility	Individuals in	If 209 (b) State is selected in section A of	If the secondary RU is not included in the
Determinations of	209(b) States Who	the Eligibility Determinations of	list of eligibility groups in the Mandatory
Individuals Age 65 or	Are Age 65 or	Individuals Age 65 or Older or Who	Eligibility Group RU:
Older or Who Have	Older or Who Have	Have Blindness or a Disability RU	Add the primary RU to the package
Blindness or a	Blindness or a	(primary), the Individuals in 209(b)	and change the selection to 209(b)
Disability	Disability	States Who Are Age 65 or Older or	State (provided this is the correct
		Who Have Blindness or a Disability RU	selection for the state).
		(secondary) will be available for selection	Save and validate the primary RU.
		and for inclusion in the submission	Navigate to the Mandatory
		package in the Mandatory Eligibility	Eligibility Group RU and locate the
		Group RU.	secondary RU in the list.
Eligibility	Closed Eligibility	Unless the Eligibility Determinations for	If the secondary RU will not display
Determinations of	Groups	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or		Have Blindness of a Disability RU	approved in MACPro nor included in the
Older or Who Have		(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	 Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		Closed Eligibility Groups RU	Alternatively, remove the secondary
		(secondary) cannot be displayed.	RU from the package.
Eligibility	Closed Eligibility	The selection of 209(b) State, or SSI	If you change your election in section
Determinations of	Groups	Criteria or 1634 State as the basis for the	A of the primary RU from 209(b)
Individuals Age 65 or		eligibility determination in section A of	State to Section 1634 State or SSI

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
Older or Who Have		the Eligibility Determinations of	Criteria State, you must include the
Blindness or a		Individuals Age 65 or Older or Who	secondary RU in the same submission
Disability		Have Blindness or a Disability RU	package, as this change will affect the
		(primary) affects the requirements	language at F.1.d. in the secondary
		displayed at F.1.d. of the Closed	RU.
		Eligibility Groups RU (secondary) with	The system will automatically include
		respect to written application.	the correct language in the secondary
			RU after the primary RU is saved and
			validated.
Eligibility	More Restrictive	Unless Eligibility Determinations of	If the secondary RU will not display
Determinations of	Requirements than	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or	SSI under 1902(f) –	Have Blindness or a Disability RU	approved in MACPro nor included in the
Older or Who Have	209(b) States	(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	• Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		More Restrictive Requirements than	Alternatively, remove the secondary
		SSI under 1902(f) – 209(b) States RU	RU from the package.
		(secondary) cannot be displayed.	
Eligibility	Ticket to Work	Unless the Eligibility Determinations of	If the secondary RU will not display
Determinations of	Basic	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or		Have Blindness or a Disability RU	approved in MACPro nor included in the
Older or Who Have		(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	• Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		Ticket to Work Basic RU (secondary)	Alternatively, remove the secondary
		cannot be displayed.	RU from the package.
Eligibility	Ticket to Work	The selection of 209(b) State, or SSI	You must complete, save and validate
Determinations of	Basic	Criteria or 1634 State as the basis for the	the primary RU before you can
Individuals Age 65 or		eligibility determination in section A of	complete the secondary RU.
Older or Who Have		the Eligibility Determinations of	Once the primary RU is approved in
Blindness or a		Individuals Age 65 or Older or Who	MACPro, it does not have to be
Disability		Have Blindness or a Disability RU	included again in a submission

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
		(primary) affects the requirements	package unless the basis changes, in
		displayed in sections B and C of the	which case the secondary RU also has
		Ticket to Work Basic RU (secondary)	to be included again.
		with respect to deductions for incurred	
		expenses.	
Eligibility	Ticket to Work	Unless the Eligibility Determinations of	If the secondary RU will not display
Determinations of	Medical	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or	Improvements	Have Blindness or a Disability RU	approved in MACPro nor included in the
Older or Who Have		(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	 Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		Ticket to Work Medical Improvements	Alternatively, remove the secondary
		RU (secondary) cannot be displayed.	RU from the package.
Eligibility	Ticket to Work	The selection of 209(b) State, or SSI	You must complete, save and validate
Determinations of	Medical	Criteria or 1634 State as the basis for the	the primary RU before you can
Individuals Age 65 or	Improvements	eligibility determination in section A of	complete the secondary RU.
Older or Who Have		the Eligibility Determinations of	Once the primary RU is approved in
Blindness or a		Individuals Age 65 or Older or Who	MACPro, it does not have to be
Disability		Have Blindness or a Disability RU	included again in a submission
		(primary) affects the requirements	package unless the basis changes, in
		displayed in sections B and C of the	which case the secondary RU also has
		Ticket to Work Medical Improvements	to be included again.
		RU (secondary) with respect to	
		deductions for incurred expenses.	
Eligibility	Individuals in	Unless the Eligibility Determinations for	If the secondary RU will not display
Determinations of	Institutions Eligible	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or	under a Special	Have Blindness of a Disability RU	approved in MACPro nor included in the
Older or Who Have	Income Level	(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	• Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		Individuals in Institutions Eligible	Alternatively, remove the secondary
			RU from the package.

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
-		under a Special Income Level RU	
		(secondary) cannot be displayed.	
Eligibility	Individuals in	The selection of 209(b) State , or SSI	You must complete, save and validate
Determinations of	Institutions Eligible	Criteria or 1634 State as the basis for the	the primary RU before you can
Individuals Age 65 or	under a Special	eligibility determination in section A of	complete the secondary RU.
Older or Who Have	Income Level	the Eligibility Determinations of	Once the primary RU is approved in
Blindness or a		Individuals Age 65 or Older or Who	MACPro, it does not have to be
Disability		Have Blindness or a Disability RU	included again in a submission
		(primary) affects the requirements	package unless the basis changes, in
		displayed in section C of the Individuals	which case the secondary RU also has
		in Institutions Eligible under a Special	to be included again.
		Income Level RU (secondary) with	
		respect to financial methodology.	
Eligibility	Medically Needy	Unless the Eligibility Determinations for	If the secondary RU will not display
Determinations of	Income Level	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or		Have Blindness or a Disability RU	approved in MACPro nor included in the
Older or Who Have		(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		Medically Needy Income Level RU	Alternatively, remove the secondary
		(secondary) cannot be displayed.	RU from the package.
Eligibility	Medically Needy	If 209(b) State is selected in section A of	You must complete, save and validate
Determinations of	Income Level	the Eligibility Determinations of	the primary RU before you can
Individuals Age 65 or		Individuals Age 65 or Older or Who	complete the secondary RU.
Older or Who Have		Have Blindness or a Disability RU	Once the primary RU is approved in
Blindness or a		(primary), the state has an option to	MACPro, it does not have to be
Disability		establish a separate income level for	included again in a submission
		individuals who are 65 years old or older,	package unless the basis changes, in
		have blindness or a disability.	which case the secondary RU also has
			to be included again.
Eligibility	Medically Needy	Unless the Eligibility Determinations for	If the secondary RU will not display
Determinations of	Resource Level	Individuals Age 65 or Older or Who	because the primary RU is neither

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
Individuals Age 65 or		Have Blindness or a Disability RU	approved in MACPro nor included in the
Older or Who Have		(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	 Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		Medically Needy Resource Level RU	Alternatively, remove the secondary
		(secondary) cannot be displayed.	RU from the package.
Eligibility	Medically Needy	If 209 (b) State is selected in section A of	You must complete, save and validate
Determinations of	Resource Level	the Eligibility Determinations of	the primary RU before you can
Individuals Age 65 or		Individuals Age 65 or Older or Who	complete the secondary RU.
Older or Who Have		Have Blindness or a Disability RU	Once the primary RU is approved in
Blindness or a		(primary), the state has an option to have	MACPro, it does not have to be
Disability		a separate resource level for individuals	included again in a submission
		who are 65 years old or older, have	package unless the basis changes, in
		blindness or a disability in the Medically	which case the secondary RU also has
		Needy Resource Level RU (secondary).	to be included again.
Eligibility	Individuals	Unless the Eligibility Determinations for	If the secondary RU will not display
Determinations of	Receiving State	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or	Plan Home and	Have Blindness of a Disability RU	approved in MACPro nor included in the
Older or Who Have	Community-Based	(primary) has either been approved in	package:
Blindness or a	Services	MACPro or is included, completed and	Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		Individuals Receiving State Plan Home	Alternatively, remove the secondary
		and Community-Based Services RU	RU from the package.
		(secondary) cannot be displayed.	
Eligibility	Individuals	The selection of 209(b) State , or SSI	You must complete, save and validate
Determinations of	Receiving State	Criteria or 1634 State as the basis for the	the primary RU before you can
Individuals Age 65 or	Plan Home and	eligibility determination in section A of	complete the secondary RU.
Older or Who Have	Community-Based	the Eligibility Determinations of	Once the primary RU is approved in
Blindness or a	Services	Individuals Age 65 or Older or Who	MACPro, it does not have to be
Disability		Have Blindness or a Disability RU	included again in a submission
		(primary) affects the requirements	package unless the basis changes, in
		displayed in section C of Individuals	

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
		Receiving State Plan Home and	which case the secondary RU also has
		Community-Based Services with respect	to be included again.
		to financial methodologies.	
Eligibility	Medically Needy	Unless the Eligibility Determinations of	If the secondary RU will not display
Determinations of	Populations Based	Individuals Age 65 or Older or Who Have	because the primary RU is neither
Individuals Age 65 or	on Age, Blindness	Blindness or a Disability RU (primary) has	approved in MACPro nor included in the
Older or Who Have	or Disability	either been approved in MACPro or is	package:
Blindness or a		included, completed and validated in the	Add the primary RU to the package,
Disability		submission package, the Medically	complete it and validate it.
		Needy Populations Based on Age,	Alternatively, remove the secondary
		Blindness or Disability RU (secondary)	RU from the package.
		cannot be displayed.	
Eligibility	Medically Needy	The selection of 209(b) State, or SSI	You must complete, save and validate
Determinations of	Populations Based	Criteria or 1634 State as the basis for the	the primary RU before you can
Individuals Age 65 or	on Age, Blindness	eligibility determination in section A of	complete the secondary RU.
Older or Who Have	or Disability	the Eligibility Determinations of	Once the primary RU is approved in
Blindness or a		Individuals Age 65 or Older or Who	MACPro, it does not have to be
Disability		Have Blindness or a Disability RU	included again in a submission
		(primary) affects the requirements	package unless the basis changes, in
		displayed in section C of the Medically	which case the secondary RU also has
		Needy Populations Based on Age,	to be included again.
		Blindness or Disability RU (secondary)	
TH. 11.11.	0 1 10	with respect to financial methodology.	TC 1 DIV III . II I
Eligibility	Optional State	Unless the Eligibility Determinations of	If the secondary RU will not display
Determinations of	Supplement	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or	Beneficiaries	Have Blindness or a Disability RU	approved in MACPro nor included in the
Older or Who Have		(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		Optional State Supplement Reneficiaries BU (secondary) connet be	Alternatively, remove the secondary
		Beneficiaries RU (secondary) cannot be	RU from the package.
		displayed.	

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Optional State Supplement Beneficiaries	The selection of 209(b) State, or SSI Criteria or 1634 State as the basis for the eligibility determination in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary) affects the requirements displayed in section A of the Optional State Supplement Beneficiaries, RU (secondary) with respect to characteristics.	 You must complete, save and validate the primary RU before you can complete the secondary RU. Once the primary RU is approved in MACPro, it does not have to be included again in a submission package unless the basis changes, in which case the secondary RU also has to be included again.
Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Work Incentives	Unless the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary) has either been approved in MACPro or is included, completed and validated in the submission package, the Work Incentives RU (secondary) cannot be displayed.	 If the secondary RU will not display because the primary RU is neither approved in MACPro nor included in the package: Add the primary RU to the package, complete it and validate it. Alternatively, remove the secondary RU from the package.
Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Work Incentives	The selection of 209(b) State, or SSI Criteria or 1634 State as the basis for the eligibility determination in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary) affects the requirements displayed in sections B and C of the Work Incentives RU (secondary) with respect to financial methodologies.	 You must complete, save and validate the primary RU before you can complete the secondary RU. Once the primary RU is approved in MACPro, it does not have to be included again in a submission package unless the basis changes, in which case the secondary RU also has to be included again.
Eligibility Determinations of Individuals Age 65 or	Individuals Eligible for but Not	Unless the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU	If the secondary RU will not display because the primary RU is neither

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
Older or Who Have	Receiving Cash	(primary) has either been approved in	approved in MACPro nor included in the
Blindness or a	Assistance	MACPro or is included, completed and	package:
Disability		validated in the submission package, the	 Add the primary RU to the package,
		Individuals Eligible for but Not	complete it and validate it.
		Receiving Cash Assistance RU	Alternatively, remove the secondary
		(secondary) cannot be displayed.	RU from the package.
Eligibility	Individuals Eligible	The selection of 209(b) State, or SSI	You must complete, save and validate
Determinations of	for but Not	<i>Criteria</i> or <i>1634 State</i> as the basis for the	the primary RU before you can
Individuals Age 65 or	Receiving Cash	eligibility determination in section A of	complete the secondary RU.
Older or Who Have	Assistance	the Eligibility Determinations of	Once the primary RU is approved in
Blindness or a		Individuals Age 65 or Older or Who	MACPro, it does not have to be
Disability		Have Blindness or a Disability RU	included again in a submission
		(primary) affects the requirements	package unless the basis changes, in
		displayed in section C of the Individuals	which case the secondary RU also has
		Eligible for but Not Receiving Cash	to be included again.
		Assistance RU (secondary) with respect	_
		to financial methodologies.	
Eligibility	Individuals Eligible	Unless the Eligibility Determinations of	If the secondary RU will not display
Determinations of	for Cash Except for	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or	Institutionalization	Have Blindness or a Disability RU	approved in MACPro nor included in the
Older or Who Have		(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	 Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		Individuals Eligible for Cash Except for	Alternatively, remove the secondary
		Institutionalization RU (secondary)	RU from the package.
		cannot be displayed.	2
Eligibility	Individuals Eligible	The selection of 209(b) State, or SSI	You must complete, save and validate
Determinations of	for Cash Except for	Criteria or 1634 State as the basis for the	the primary RU before you can
Individuals Age 65 or	Institutionalization	eligibility determination in section A of	complete the secondary RU.
Older or Who Have		the Eligibility Determinations of	Once the primary RU is approved in
Blindness or a		Individuals Age 65 or Older or Who	MACPro, it does not have to be
Disability		Have Blindness or a Disability RU	included again in a submission

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
		(primary) affects the requirements	package unless the basis changes, in
		displayed in section C of the Individuals	which case the secondary RU also has
		Eligible for Cash Except for	to be included again.
		Institutionalization RU (secondary) with	
		respect to financial methodologies.	
Eligibility	Family Opportunity	Unless the Eligibility Determinations of	If the secondary RU will not display
Determinations of	Act Children with a	Individuals Age 65 or Older or Who	because the primary RU is neither
Individuals Age 65 or	Disability	Have Blindness or a Disability RU	approved in MACPro nor included in the
Older or Who Have		(primary) has either been approved in	package:
Blindness or a		MACPro or is included, completed and	Add the primary RU to the package,
Disability		validated in the submission package, the	complete it and validate it.
		Family Opportunity Act Children with	Alternatively, remove the secondary
		a Disability RU (secondary) cannot be	RU from the package.
		displayed.	
Eligibility	Family Opportunity	The selection of 209(b) State , or SSI	• You must complete, save and validate
Determinations of	Act Children with a	Criteria or 1634 State as the basis for the	the primary RU before you can
Individuals Age 65 or	Disability	eligibility determination in section A of	complete the secondary RU.
Older or Who Have		the Eligibility Determinations of	Once the primary RU is approved in
Blindness or a		Individuals Age 65 or Older or Who	MACPro, it does not have to be
Disability		Have Blindness or a Disability RU	included again in a submission
		(primary) affects the requirements	package unless the basis changes, in
		displayed in section B of the Family	which case the secondary RU also has
		Opportunity Act Children with a	to be included again.
		Disability RU (secondary) with respect to	
		financial methodologies.	

INSTRUCTIONS

A. <u>Eligibility Determinations of Individuals Who Are Age 65 or Older or Who Have</u> Blindness or a Disability

Select one of the three options at **A.1.** through **A.3.** to indicate which eligibility methodology the state uses for individuals who qualify based on being 65 years old or older, or having blindness or a disability.

- This selection must be made before you can select eligibility groups in the **Mandatory Eligibility Groups** and **Optional Eligibility Groups** RUs.
- If you change your state's election here, you must make corresponding updates in the **Mandatory Eligibility Groups** and **Optional Eligibility Groups** RUs concerning the optional and mandatory eligibility groups covered. A message will display concerning this requirement.
- If the selection is changed from *SSI Criteria State* or *209(b) State* to *1634 State*, you must make updates to the **Eligibility Determinations and Fair Hearings** RU under the **Administration** section of the state plan. A message will display concerning this requirement.

B. Additional Information (optional)

Except in limited circumstances, this field should remain blank. Please consult with CMS before adding any additional information concerning this RU.

REVIEW CRITERIA

In section A, the option selected must reflect the state plan choices already made for individuals qualifying based on being 65 years old or older, or having blindness or a disability, unless the submission is amending the state plan to change the methodology previously used.