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**State/Territory Name: North Carolina**

**State Plan Amendment (SPA) #: 21-0025**

This file contains the following documents in the order listed:

- 1) Approval Letter
- 2) Summary Form (with 179-like data)
- 3) Approved SPA Pages

DEPARTMENT OF HEALTH & HUMAN SERVICES  
Centers for Medicare & Medicaid Services  
Medicaid and CHIP Operations Group  
601 E 1<sup>st</sup> Room 5  
Kansas City, MO 64106



## Center for Medicaid & CHIP Services

March 24, 2022

Dave Richard  
Deputy Secretary for NC Medicaid  
NC Medicaid Division of Health Benefits  
2501 Mail Service Center  
Raleigh NC 7699 01

Re: Approval of State Plan Amendment NC-21-0025

Dear Mr. Richard,

On December 28, 2021, the Centers for Medicare and Medicaid Services (CMS) received North Carolina State Plan Amendment (SPA) NC-21-0025. This SPA proposed to raise the effective income eligibility standard for certain individuals who are otherwise eligible to receive services through North Carolina's traumatic brain injury (TBI) waiver.

We approve North Carolina State Plan Amendment (SPA) NC-21-0025 with an effective date(s) of October 01, 2021.

If you have any questions regarding this amendment, please contact William Pak at [william.pak@cms.hhs.gov](mailto:william.pak@cms.hhs.gov)

Sincerely,

Director, Division of Program  
Operations

Center for Medicaid & CHIP Services

## Submission - Summary

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC 21-0025

### Package Header

**Package ID** NC2021MS00020  
**Submission Type** Official  
**Approval Date** 3/24/2022  
**Superseded SPA ID** N/A

**SPA ID** NC-21-0025  
**Initial Submission Date** 12/28/2021  
**Effective Date** N/A

### State Information

**State/Territory Name:** North Carolina

**Medicaid Agency Name:** Division of Medical Assistance

### Submission Component

State Plan Amendment

Medicaid

CHIP

# NC Submission Package NC2021MS00020 (NC 21 0025) Eligibility

[Summary](#) [Reviewable Units](#) [Versions](#) [Correspondence Log](#) [Analyst Notes](#) [Approval Letter](#) [Transaction Logs](#) [News](#) [Related Actions](#)

CMS-10434 OMB 0938-1188

## Package Information

<b>Package ID</b>	NC2021MS00020	<b>Submission Type</b>	Official
<b>Program Name</b>	N/A	<b>State</b>	NC
<b>SPA ID</b>	NC-21-0025	<b>Region</b>	Atlanta, GA
<b>Version Number</b>	10	<b>Package Status</b>	Approved
<b>submitted By</b>	Betty taton	<b>ubmission Date</b>	1 / / 0 1
<b>Package Disposition</b>		<b>Approval Date</b>	/ 4/ 0 1 4 PM EDT
<b>Priority Code</b>	P2		
<b>Lead Division</b>	DMEP		

## Submission - Summary

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

### Package Header

**Package ID** NC2021MS00020  
**Submission Type** Official  
**Approval Date** / 4/ 0  
**Superseded PA ID** N/A

**SPA ID** NC-21-0025  
**Initial Submission Date** 12/28/2021  
**Effective Date** N/A

### SPA ID and Effective Date

**SPA ID** NC-21-0025

Reviewable Unit	Proposed Effective Date	Superseded SPA ID
Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	10/1/2021	New
Non-MAGI Methodologies	10/1/2021	New
Medically Needy Income Level	10/1/2021	TN92-01
Handling of Excess Income (Spenddown)	10/1/2021	TN92-01
Medically Needy Resource Level	10/1/2021	TN94-36
Mandatory Eligibility Groups	10/1/2021	New
Optional Eligibility Groups	10/1/2021	New
Optional State Supplement Beneficiaries	10/1/2021	New
Age and Disability-Related Poverty Level	10/1/2021	New
Medically Needy Populations Based on Age, Blindness or Disability	10/1/2021	New

**Page Number of the Superseded Plan Section or Attachment (If Applicable):**

## Submission - Summary

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

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<b>Approval Date</b>	3/24/2022	<b>Effective Date</b>	N/A
<b>Superseded SPA ID</b>	N/A		

### Executive Summary

**Summary Description Including Goals and Objectives** NC is adding income disregards for the Traumatic Brain Injury Waiver population, authorized under 1902(r)(2) to eligibility groups that are already covered in our State Plan, to make the effective income level up to 300% of the FPL.

### Federal Budget Impact and Statute/Regulation Citation

#### Federal Budget Impact

	Federal Fiscal Year	Amount
First	2022	\$3259619
Second	2023	\$2902847

#### Federal Statute / Regulation Citation

20 CFR 416 2001 State Supplementary payment and NC G S. 108A-40. 1932(a)(1)(A) of the Social Security Act (the Act)

Supporting documentation of budget impact is uploaded (optional).

Name	Date Created	
TBI Eligibility Change FN 20210928 (Final)	12/28/2021 11:15 AM EST	

## Submission - Summary

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**Effective Date** N/A

### Governor's Office Review

- No comment
- Comments received
- No response within 45 days
- Other

# Medicaid State Plan Eligibility

## Income/Resource Methodologies

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

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

#### Package Header

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<b>Superseded SPA ID</b>	New		
	User-Entered		

#### A. Eligibility Determinations of Individuals Who Are Age 65 or Older or Who Have Blindness or a Disability

Eligibility determinations of individuals who are age 65 or older or who have blindness or a disability are based on one of the following:

1. SSA Eligibility Determination State (1634 State)

The state has an agreement under section 1634 of the Social Security Act for the Social Security Administration to determine Medicaid eligibility of 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.

2. State Eligibility Determination (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, and determines financial eligibility based on SSI income and resource methodologies.

3. State Eligibility Determination (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, and determines financial eligibility using income and resource methodologies more restrictive than SSI.

#### B. Additional information (optional)

# Medicaid State Plan Eligibility

## Income/Resource Methodologies

### Non MAGI Methodologies

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

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	User-Entered		

The state will apply the methodologies as described below, and consistent with 42 CFR 435.601, 435.602, and 435.831.

#### A. Basic Financial Methodology

1. The state applies the income and resource methodologies of the SSI program when determining eligibility for a population based on age (65 or older) or having blindness or a disability, with the exceptions described below in B. through G.

2. The state applies the financial methodologies of either the SSI program or the AFDC program in effect as of July 16, 1996 (whichever is most closely related) when determining eligibility for a population based on age (as a child), pregnancy, or status as a caretaker relative, with the exceptions described below in B. through G.

#### B. Use of Less Restrictive Methodologies

1. The state elects to apply income and/or resources methodologies that are less restrictive than those used under the cash assistance programs, in accordance with 42 CFR 435.601(d).

Yes

No

2. The less restrictive income and resource methodologies are described on the RU for each applicable eligibility group.



# Non-MAGI Methodologies

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC 21 0025

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	User-Entered		

## C. Financial Responsibility of Relatives

1. In determining financial eligibility for an individual, the state does not include income and resources from anyone other than the individual's spouse, and for individuals under age 21 or who have blindness or disability, the individual's parent.

a The state includes the income and resources of a spouse or parent only when they are living with the individual in the same household, except as follows:

i. In the case of spouses who are age 65 or older or who have blindness or disability and who share the same room in a Medicaid institution, the state:

- (1) Considers these couples either as living together or as living separately for the purpose of counting income and resources, whichever is more advantageous to the couple.
- ( ) Considers these couples as living separately for the purpose of counting income and resources

ii Where applicable the state determines income and resource eligibility consistent with the spousal impoverishment rules of section 19 4 of the Act as described in the Resource Assessment and Eligibility reviewable unit.

b. In the case of individuals under age 21 for whom AFDC is the most closely related cash assistance program, the income and resources of parents and spouses are included only if the individual would have been considered a dependent under the state's approved AFDC state plan in effect as of July 16 1996

# Non-MAGI Methodologies

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<b>Superseded SPA ID</b>	New User-Entered		

## D. Family Size

1. The family size of an individual for whom the SSI income and resource methodologies are used (as described in section A) includes the persons identified below:

- a. The individual applying, or
- b. If the individual lives together with his or her spouse, the individual applying and the spouse, or
- c. If the individual lives together with his or her parent(s) and the individual is under 21 or has blindness or a disability, the individual applying and the parent(s).

2. The family size of an individual for whom the AFDC income and resource methodologies are used (as described in section A.), includes the persons who would have been included in the family under the state's July 16, 1996 AFDC state plan, except where the state has elected to use the MAGI-like methodologies (as described in section E).

3. The state defines family size for one or more of the following FPL eligibility groups to include others beyond those identified in D.1. and D.2.

- Yes
- No
- a. Qualified Medicare Beneficiaries (described in section 1902(a)(10)(E)(i) of the Act)
- b. Specified Low Income Medicare Beneficiaries (described in section 1902(a)(10)(E)(iii) of the Act)
- c. Qualifying Individuals (described in section 1902(a)(10)(E)(iv) of the Act)
- d. Qualified Disabled and Working Individuals (described in section 1902(a)(10)(E)(ii) of the Act)
- e. Age and Disability-Related Poverty Level (described in section 1902(a)(10)(A)(ii)(X) of the Act)
- f. Work Incentives (described in section 1902(a)(10)(A)(ii)(XIII) of the Act)
- g. Family Opportunity Act Children with a Disability (described in section 1902(a)(10)(A)(ii)(XIX) of the Act)
- h. Individuals Receiving State Plan Home and Community-Based Services (described in 42 CFR 435.219)

4. The state uses the same definition of family size for the selected FPL eligibility groups.

- Yes
- No

5. For the selected FPL eligibility groups, family size is defined as follows:

- a. Family is defined as the individual, the individual's spouse and the individual's children under age 18 living together in the same household. If the individual is a child, the child's parents and siblings under age 18 are also included in the household if living together.

**Optional description:**

- b. The state uses another definition of family.

## Non-MAGI Methodologies

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### E. Use of MAGI-like Methodologies

1. The state uses MAGI-like methodologies for one or more populations for whom the most closely related cash assistance program would be the AFDC program in effect as of July 16, 1996.

- Yes
- No

## Non-MAGI Methodologies

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### F. Countable Income Deductions for the Medically Needy

In determining countable income for individuals who are age 65 or older or who have blindness or a disability, the state deducts:

1. Amounts that would be deducted in determining eligibility under SSI.
2. The highest amounts that would be deducted in determining eligibility for optional state supplements if these supplements are paid to all individuals who are receiving SSI or would be eligible for SSI except for their income.

## Non-MAGI Methodologies

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### G. Additional Information (optional)

# Medicaid State Plan Eligibility

## Income/Resource Standards

### Medically Needy Income Level

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

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	User-Entered		

#### A. Income Level Used

1. The state employs a single income level for the medically needy.
2. The income level varies based on differences between shelter costs in urban and rural areas.

- Yes  
 No

3. The level used is:

Household size	Standard
9	\$542.00
10	\$575.00
11	\$600.00
12	\$633.00
13	\$667.00
14	\$700.00
1	\$242.00
2	\$317.00
3	\$367.00
4	\$400.00
5	\$433.00
6	\$467.00
7	\$500.00
8	\$525.00

**The state uses an additional incremental amount for larger household sizes.**

- Yes  
 No

**Incremental Amount:**  
\$33.00

**The dollar amounts increase automatically each year**

- Yes  
 No

# Medically Needy Income Level

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

## Package Header

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## B. Basis for Income Level

### 1. Minimum Income Level

The minimum income level for this eligibility group is the lower of the state's July 1996 AFDC payment standard or the state's income standard for the Parents and Other Caretaker Relatives eligibility group.

### 2. Maximum Income Level

The maximum income level for this eligibility group is 133 1/3 percent of the higher of the state's 1996 AFDC payment standard or the state's income standard for the Parents and Other Caretaker Relatives eligibility group.

# Medically Needy Income Level

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## C. Additional Information (optional)



# Medicaid State Plan Eligibility

## Income/Resource Standards

### Handling of Excess Income (Spendedown)

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

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If countable income exceeds the income standard, the state must deduct from income medical expenses incurred by the individual or family or financially responsible relatives that are not subject to payment by a third party, in accordance with 42 CFR 435.831 and 42 CFR 435.121.

#### A. Budget Periods

Income in excess of the appropriate income standard is considered available for payment of medical or remedial care expenses in budget periods that do not exceed six months.

1. In determining income eligibility, countable income is reduced by the amount of incurred medical or remedial care expenses during the budget period specified below:

- a. One budget period of:
  - i. 6 months
  - ii. 5 months
  - iii. 4 months
  - iv. 3 months
  - v. 2 months
  - vi. 1 month
- b. More than one budget period, as described below:

2. The state includes part or all of the retroactive period in the budget period.

- Yes
- No

## Handling of Excess Income (Spendedown)

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

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### B. Types of Eligible Expenses

1. In determining incurred expenses to be deducted from income, the state includes:

- Medicare, Medicaid, and other health insurance premiums and enrollment fees.
- Cost sharing, including copayments, coinsurance, and deductibles, imposed by Medicare, Medicaid or other health insurance.
- Expenses for necessary medical and remedial services recognized by state law but not included in the state plan.
- Expenses for necessary medical and remedial services included in the state plan, including those that exceed limitations on the amount, duration, and scope of services.

2. The state also includes medical institutional expenses projected to the end of the budget period at the Medicaid reimbursement rate.

Yes

No

3. Incurred expenses subject to payment by a third party are not deducted unless the third party is a public program (other than Medicaid) of a state and the program is financed by the state.

# Handling of Excess Income (Spendedown)

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	User-Entered		

## C. Timeframe of Deduction of Expenses

In determining incurred expenses to be deducted from income, the state deducts:

1. For retroactive budget periods and a budget period that includes both retroactive and prospective budget, the state deducts:

- a. Eligible expenses incurred during the budget period, whether paid or unpaid.
- b. Payments made during the budget period on eligible expenses incurred at any time prior to the budget period, if not previously deducted in establishing eligibility.
- c. Unpaid eligible expenses, which have not been deducted previously in establishing eligibility, and were incurred:
  - i. At any time prior to the budget period.
  - ii. Prior to the third month before the month of application, but no earlier than:  
24 months
  - iii. No earlier than the third month before the month of application.

2. For prospective budget period(s), the state deducts:

- a. Eligible expenses incurred during the budget period, whether paid or unpaid.
- b. Payments made during the budget period on eligible expenses incurred at any time prior to the budget period, if not previously deducted in establishing eligibility.
- c. Unpaid eligible expenses that are carried over from the prior budget period and have not been deducted previously in establishing eligibility.

## Handling of Excess Income (Spenddown)

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

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	User-Entered		

### D. Order of Deduction of Expenses

Incurred medical or remedial care expenses are deducted in the following order:

1. By the type of service, in the following order:
  - a. Premiums, deductibles, coinsurance and co-payments.
  - b. Expenses for necessary medical or remedial care services that are recognized under state law but not included in the State Plan.
  - c. Expenses for necessary medical or remedial care services that are included in the state Plan that exceed agency limitations on amount, duration, or scope of services.
  - d. Expenses for necessary medical or remedial care services that are included in the state Plan that are within the agency limitations on amount, duration, or scope of services.
2. In chronological order by the date of the service, or the date cost sharing payments are due.
3. In chronological order by the date the bill is submitted to the state by the individual.

## Handling of Excess Income (Spendedown)

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### E. Reasonable Limitations

The state sets reasonable limits on the amount to be deducted for expenses.

- Yes
- No

## Handling of Excess Income (Spendedown)

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### F. Spendedown Payments Made by Individuals

The state permits individuals to pay-in their spenddown liability.

- Yes
- No

## Handling of Excess Income (Spendedown)

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### G. Additional Information (optional)

# Medicaid State Plan Eligibility

## Income/Resource Standards

### Medically Needy Resource Level

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

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<b>Superseded SPA ID</b>	TN94-36		
	User-Entered		

#### A. Medically Needy Resource Level Structure

1. The state employs a single resource level for the medically needy.
2. The resource level is equal to or higher than the lowest resource standard used under the most closely related cash assistance program.



# Medically Needy Resource Level

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User-Entered

**SPA ID** NC-21-0025  
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**Effective Date** 10/1/2021

## B. Resource Level Used

The level used is:

Household size	Standard
1	\$2000.00
2	\$3000.00

The state uses an additional incremental amount for larger household sizes.

- Yes
- No

## Medically Needy Resource Level

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### Package Header

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<b>Submission Type</b>	Official	<b>Initial Submission Date</b>	12/28/2021
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<b>Superseded SPA ID</b>	TN94-36		
	User-Entered		

### C. Additional Information (optional)

The state resource levels for this group are the same as the SSI levels.

# Medicaid State Plan Eligibility

## Mandatory Eligibility Groups

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025











### Package Header

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<b>Superseded SPA ID</b>	New		
	User-Entered		









### Mandatory Coverage





A. The state provides Medicaid to mandatory groups of individuals. The mandatory groups covered are:

#### Families and Adults

Eligibility Group Name		Covered In State Plan	Include RU In Package 	Included in Another Submission Package	Source Type 
Infants and Children under Age 19		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	CONVERTED
Parents and Other Caretaker Relatives		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	CONVERTED
Pregnant Women		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	CONVERTED
Deemed Newborns		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Children with Title IV-E Adoption Assistance, Foster Care or Guardianship Care		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Former Foster Care Children		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Transitional Medical Assistance		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Extended Medicaid due to Spousal Support Collections		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW

#### Aged Blind and Disabled

Eligibility Group Name		Covered In State Plan	Include RU In Package 	Included in Another Submission Package	Source Type 
SSI Beneficiaries		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Closed Eligibility Groups		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Individuals Deemed To Be Receiving SSI		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Working Individuals under 1619(b)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	NEW
Qualified Medicare Beneficiaries		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Qualified Disabled and Working Individuals		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW

Eligibility Group Name		Covered In State Plan	Include RU In Package 	Included in Another Submission Package	Source Type 
pecified Low Income Medicare Beneficiaries		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Qualifying Individuals		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW

# Mandatory Eligibility Groups

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC 21 0025

## Package Header

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	User-Entered		

**B. The state elects the Adult Group, described at 42 CFR 435.119.**

Yes  No

**C. Additional Information (optional)**

## Eligibility Groups Deselected from Coverage

The following eligibility groups were previously covered in the source approved version of the state plan and deselected from coverage as part of this submission package

- N/A

# Medicaid State Plan Eligibility

## Optional Eligibility Groups

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

### Package Header

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<b>Superseded SPA ID</b>	New User-Entered		

### A. Options for Coverage

The state provides Medicaid to specified optional groups of individuals.

Yes  No

















The optional eligibility groups covered in the state plan are (elections made in this screen may not be comprehensive during the transition period from the paper-based state plan to MACPro):

#### Families and Adults

Eligibility Group Name		Covered In State Plan	Include RU In Package	Included in Another Submission Package	Source Type
Optional Coverage of Parents and Other Caretaker Relatives		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Reasonable Classifications of Individuals under Age 21		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	CONVERTED
Children with Non-IV-E Adoption Assistance		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	CONVERTED
Independent Foster Care Adolescents		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	CONVERTED
Optional Targeted Low Income Children		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Individuals above 133% FPL under Age 65		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Individuals Needing Treatment for Breast or Cervical Cancer		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Individuals Eligible for Family Planning Services		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	CONVERTED
Individuals with Tuberculosis		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Individuals Electing COBRA Continuation Coverage		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW

#### Aged, Blind and Disabled

Eligibility Group Name		Covered In State Plan	Include RU In Package	Included in Another Submission Package	Source Type
Individuals Eligible for but Not Receiving Cash Assistance		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW

Eligibility Group Name		Covered In State Plan	Include RU In Package 	Included in Another Submission Package	Source Type 
Individuals Eligible for Cash Except for Institutionalization		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Individuals Receiving Home and Community-Based Waiver Services under Institutional Rules		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Optional State Supplement Beneficiaries		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	APPROVED
Individuals in Institutions Eligible under a Special Income Level		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
PACE Participants		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Individuals Receiving Hospice		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Children under Age 19 with a Disability		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Age and Disability-Related Poverty Level		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	APPROVED
Work Incentives		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Ticket to Work Basic		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	NEW
Ticket to Work Medical Improvements		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Family Opportunity Act Children with a Disability		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Individuals Receiving State Plan Home and Community-Based Services		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW
Individuals Receiving State Plan Home and Community-Based Services Who Are Otherwise Eligible for HCBS Waivers		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW

# Optional Eligibility Groups

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

## Package Header

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	User-Entered		

## B. Medically Needy Options for Coverage

The state provides Medicaid to specified groups of individuals who are medically needy.

Yes  No

The medically needy eligibility groups covered in the state plan are:

### 1. Mandatory Medically Needy:

#### Families and Adults

Eligibility Group Name		Covered In State Plan	Include RU In Package	Included in Another Submission Package	Source Type
Medically Needy Pregnant Women		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	NEW
Medically Needy Children under Age 18		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW

#### Aged, Blind and Disabled

Eligibility Group Name		Covered In State Plan	Include RU In Package	Included in Another Submission Package	Source Type
Protected Medically Needy Individuals Who Were Eligible in 1973		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	NEW

### 2. Optional Medically Needy:

#### Families and Adults

Eligibility Group Name		Covered In State Plan	Include RU In Package	Included in Another Submission Package	Source Type
Medically Needy Reasonable Classifications of Individuals under Age 21		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	NEW
Medically Needy Parents and Other Caretaker Relatives		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	NEW

#### Aged, Blind and Disabled

Eligibility Group Name		Covered In State Plan	Include RU In Package	Included in Another Submission Package	Source Type
Medically Needy Populations Based on Age, Blindness or Disability		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	APPROVED



## Optional Eligibility Groups

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

### Package Header

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### C. Additional Information (optional)

#### Eligibility Groups Deselected from Coverage

The following eligibility groups were previously covered in the source approved version of the state plan and deselected from coverage as part of this submission package:

- N/A

# Medicaid State Plan Eligibility

## Eligibility Groups - Options for Coverage

### Optional State Supplement Beneficiaries

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

Individuals who receive an optional state supplementary payment.

#### Package Header

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The state covers the Optional State Supplement Beneficiaries eligibility group in accordance with the following provisions:

#### A. Characteristics

Individuals qualifying under this eligibility group must meet the following criteria:

1. Receive an optional state supplement that meets the conditions described in sections C and D.
2. Except for income, would be eligible for SSI.
3. Do not have gross income exceeding 300% of the SSI Federal Benefit Rate (FBR).

# Optional State Supplement Beneficiaries

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

## Package Header

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## B. Individuals Covered

1. The state covers all individuals who meet the characteristics described in section A.

- Yes
- No

# Optional State Supplement Beneficiaries

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

## Package Header

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## C. Optional State Supplement Program

1. The optional state supplement program is administered:

- a. Solely by the federal government. The state has an agreement with the Social Security Administration under section 1616 of the Act regarding the administration of optional state supplementary payments.
- b. By a combination of federal and state administration. The state has an agreement with the Social Security Administration under section 1616 of the Act regarding the administration of optional state supplementary payments for some classifications of individuals, while state supplementary payments for other classifications of individuals are administered by the state.
- c. Solely by the state.

2. Payments under the optional state supplement program are:

- a. Based on need and paid in cash on a regular basis;
- b. Equal to the difference between the individual's countable income and the income standard used to determine eligibility for supplement; and
- c. Available to all individuals in each population selected in section B.

# Optional State Supplement Beneficiaries

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

## Package Header

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**Superseded SPA ID** New  
User-Entered

**SPA ID** NC-21-0025  
**Initial Submission Date** 12/28/2021  
**Effective Date** 10/1/2021

## D. Income Standard of Optional State Supplement Program

1. The income standard for the optional state supplement:

- a. Varies by political subdivision.
  - Yes
  - No
- b. Varies by payment classification.
  - Yes
  - No

The payment classifications used are:

- i. All individuals age 65 or older, regardless of living arrangement.

### Income Standard

I C  
n o  
d u  
i v p  
i l  
d e  
u \$  
a 1  
l 2  
\$ 2  
1 8.  
2 0  
2 0  
8.  
0  
0

- ii. All individuals who have blindness, regardless of living arrangement.

### Income Standard

I C  
n o  
d u  
i v p  
i l  
d e  
u \$  
a 1  
l 2  
\$ 2  
1 8.  
2 0  
2 0  
8.  
0  
0

- iii. All individuals who have a disability, regardless of living arrangement.

### Income Standard

I C

n  
d  
i  
v  
i  
d  
u  
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l  
\$  
1  
2  
2  
1  
2  
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\$  
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0  
0

- iv. Independent living.
- v. Living in household of another.
- vi. Independent living and receiving non-medical care outside the home.
- vii. Living in household of another and receiving non-medical care outside the home.
- viii. Living in a domiciliary facility or other group living arrangement.
- ix. Other payment classification.

## Optional State Supplement Beneficiaries

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

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### E. Additional Information (optional)

The state does serve married couples who receive Special Assistance In-home, but they are budgeted separately as a budget unit of one. Each person in the couple has a income limit of \$1228.

# Medicaid State Plan Eligibility

## Eligibility Groups - Options for Coverage

### Age and Disability- Related Poverty Level

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

Individuals who are age 65 or older or who have a disability, with income no higher than 100% FPL.

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The state covers the optional Age and Disability-Related Poverty Level eligibility group in accordance with the following provisions:

#### A. Characteristics

Individuals qualifying under this eligibility group must meet the following criteria:

1. Meet at least one of the following condition(s):
  - a. Are age 65 or older; or
  - b. Have a disability.
2. Have income and resources at or below the standard for this group.



# Age and Disability- Related Poverty Level

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

## Package Header

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**Superseded SPA ID** New  
User-Entered

**SPA ID** NC-21-0025  
**Initial Submission Date** 12/28/2021  
**Effective Date** 10/1/2021

## B. Individuals Covered

1. The state covers all individuals who meet the characteristics described in section A.

- Yes
- No

# Age and Disability- Related Poverty Level

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

## Package Header

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User-Entered

**SPA ID** NC-21-0025  
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**Effective Date** 10/1/2021

## C. Financial Methodologies

1. SSI methodologies are used in calculating household income and resources. Please refer as necessary to Non-MAGI Methodologies, completed by the state.

2. Less restrictive methodologies are used in calculating countable income.

Yes

No

a. The state uses the same less restrictive income methodologies for all individuals covered.

Yes

No

The less restrictive income methodologies are:

General income disregard:

Name of disregard:	Description:
Traumatic Brain Injury Waiver disregard income between 100%-300% of the FPL	Disregard the income between 100% and 300% of the FPL for those beneficiaries who are eligible to participate in the Traumatic Brain Injury Waiver program.
Eugenics Asexualization and Sterilization Payments	Payments made under the authority of N.C.G.S. Section 6.18(a) Article 9 of Chapter 143B, Part 30 Eugenics Asexualization and Sterilization Compensation Program are not counted.
Annual Social Security COLA Disregard	When the annual Social Security COLA and Federal Poverty Level adjustment cause ineligibility for Medicaid; disregard the most recent Social Security COLA increase.  This disregard continues until the individual loses Medicaid or becomes eligible without this disregard.

Census Bureau wages are disregarded.

**Description of disregard:** Disregard  
Census  
bureau  
wages

3. Less restrictive methodologies are used in calculating countable resources.

- Yes
- No

a. The state uses the same less restrictive resource methodologies for all individuals covered.

- Yes
- No

The less restrictive resource methodologies are:

General resource disregard:

Name of disregard:	Description:
Eugenics Asexualization and Sterilization Payments	Payments made under the authority of N.C.G.S. Section 6.18(a) Article 9 of Chapter 143B, Part 30 Eugenics Asexualization and Sterilization Compensation Program are not counted.
Personal Effects and Household Goods	The value of personal effects and household goods are not counted.
Real Property-Tax Value	The current market value for real property is the tax assessed value. The tax assessed value may be reduced if evidence is provided proving that the current market value is less than the tax assessed value.
Value of Life Estate Interest in Real Property	For individuals not receiving optional State Supplements, the value of life estate interest in real property is not counted.
Tenancy in Common Interest	For individuals not receiving optional State Supplements, the value of tenancy in common interest in real property is not counted.
Burial Plots	Value of burial plots are not counted.

Name of disregard:	Description:
Cash Surrender Value of Life Insurance	The cash value of life insurance when the total face value of all cash value bearing life insurance policies does not exceed ten thousand dollars is not counted.
Contiguous Property to Principle Place of Residence	Up to \$12,000 of real property contiguous to the individual's principal place of residence when the individual has no ownership interest in his principal place of residence
Excess/Reduction of Resources	Individuals with resources in excess of the resource limit at the first moment of the month may become eligible at the point that resources are reduced to the allowable limit.

- A beneficiary of a "qualified state long-term care insurance partnership" policy (partnership policy), as defined in section 1917(b)(1)(C) of the Social Security Act and 45 CFR 144.200 et seq., is provided a resource disregard, equal to the amount of the insurance benefit payments made to or on behalf of the individual from the partnership policy.

## Age and Disability- Related Poverty Level

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

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User-Entered

**SPA ID** NC-21-0025  
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**Effective Date** 10/1/2021

### D. Income Standard Used

The income standard for this eligibility group is:

- 1. 100% FPL
- 2. A lower percent of the FPL:

## Age and Disability- Related Poverty Level

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

### Package Header

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### E. Resource Standard Used

The resource standard used is:

- 1. The resource limit for the SSI program; or
- 2. The resource limit used in the state's medically needy program, if higher.

## Age and Disability- Related Poverty Level

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS0002O | NC-21-0025

### Package Header

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### F. Additional Information (optional)

# Medicaid State Plan Eligibility

## Eligibility Groups - Medically Needy

### Medically Needy Populations Based on Age, Blindness or Disability

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS0002O | NC-21-0025

Individuals who are age 65 or older or who have blindness or a disability who do not qualify as categorically needy.

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The state covers the optional Medically Needy Populations Based on Age, Blindness or Disability eligibility group in accordance with the following provisions:

#### A. Characteristics

Individuals qualifying under this eligibility group must meet the following criteria:

1. Meet at least one of the following:

- a. Are age 65 or older;
- b. Have blindness; or
- c. Have a disability.

2. Are not otherwise eligible for categorically needy coverage under the state plan.

3. Have income at or below the medically needy income level and resources at or below the medically needy resource level.



# Medically Needy Populations Based on Age, Blindness or Disability

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

## Package Header

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	User-Entered		

## B. Individuals Covered

The state covers the following populations:

- 1. Individuals age 65 or older
- 2. Individuals with blindness
- 3. Individuals who have a disability

# Medically Needy Populations Based on Age, Blindness or Disability

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

## Package Header

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<b>Superseded SPA ID</b>	New		
	User-Entered		

## C. Financial Methodologies

1. The state uses the same financial methodology for all individuals covered.

Yes

No

2. The financial methodology used is:

a. SSI methodologies. Please refer as necessary to Non-MAGI Methodologies, completed by the state.

b. Less restrictive methodologies are used in calculating countable income.

Yes  No

The less restrictive income methodologies are:

General income disregard:

Name of disregard:	Description:
Traumatic Brain Injury Waiver 100-300% of the FPL	Disregard the income between 100% and 300% of the FPL for those beneficiaries who are eligible to participate in the Traumatic Brain Injury Waiver program.
Eugenics Asexualization and Sterilization Payments	Payments made under the authority of N.C.G.S. Section 6.18(a) Article 9 of Chapter 143B, Part 30 Eugenics Asexualization and Sterilization Compensation Program are not counted.

Census Bureau wages are disregarded.

**Description of disregard:** Disregard Census Bureau income disregard

c. Less restrictive methodologies are used in calculating countable resources.

Yes  No

The less restrictive resource methodologies are:

General resource disregard:

Name of disregard:	Description:
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Name of disregard:	Description:
Annual Social Security COLA Disregard	When the annual Social Security COLA and Federal Poverty Level adjustment cause ineligibility for Medicaid; disregard the most recent Social Security COLA increase.
Personal Effects and Household Goods	The value of personal effects and household goods are not counted.
Real Property-Tax Value	The current market value for real property is the tax assessed value. The tax assessed value may be reduced if evidence is provided proving that the current market value is less than the tax assessed value.
Value of Life Estate Interest in Real Property	For individuals not receiving optional State Supplements, the value of life estate interest in real property is not counted.
Value of Real Property-Tenancy in Common Interest	For individuals not receiving optional State Supplements, the value of tenancy in common interest in real property is not counted.
Burial Plots	Value of burial plots are not counted.
Cash Surrender Value of Life Insurance	The cash value of life insurance when the total face value of all cash value bearing life insurance policies does not exceed ten thousand dollars is not counted.
Contiguous Property to Principle Place of Residence	Up to \$12,000 of real property contiguous to the individual's principal place of residence when the individual has no ownership interest in his principal place of residence

Name of disregard:	Description:
Eugenics Asexualization and Sterilization Payments	Payments made under the authority of N.C.G.S. Section 6.18(a) Article 9 of Chapter 143B, Part 30 Eugenics Asexualization and Sterilization Compensation Program are not counted.
Excess/Reduction of Resources	Individuals with resources in excess of the resource limit at the first moment of the month may become eligible at the point that resources are reduced to the allowable limit.

- A beneficiary of a "qualified state long-term care insurance partnership" policy (partnership policy), as defined in section 1917(b)(1)(C) of the Social Security Act and 45 CFR 144.200 et seq., is provided a resource disregard, equal to the amount of the insurance benefit payments made to or on behalf of the individual from the partnership policy.

# Medically Needy Populations Based on Age, Blindness or Disability

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

## Package Header

<b>Package ID</b>	NC2021MS00020	<b>SPA ID</b>	NC-21-0025
<b>Submission Type</b>	Official	<b>Initial Submission Date</b>	12/28/2021
<b>Approval Date</b>	3/24/2022	<b>Effective Date</b>	10/1/2021
<b>Superseded SPA ID</b>	New User-Entered		

## D. Income Standard Used

The income standard used for this group is described in the Medically Needy Income Level RU.

# Medically Needy Populations Based on Age, Blindness or Disability

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS00020 | NC-21-0025

## Package Header

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<b>Superseded SPA ID</b>	New User-Entered		

## E. Resource Standard Used

The resource standard used for this group is described in the Medically Needy Resource Level RU.

# Medically Needy Populations Based on Age, Blindness or Disability

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS0002O | NC-21-0025

## Package Header

<b>Package ID</b>	NC2021MS0002O	<b>SPA ID</b>	NC-21-0025
<b>Submission Type</b>	Official	<b>Initial Submission Date</b>	12/28/2021
<b>Approval Date</b>	3/24/2022	<b>Effective Date</b>	10/1/2021
<b>Superseded SPA ID</b>	New User-Entered		

## F. Spenddown

The state allows individuals to deduct incurred medical and remedial expenses (spend down) to become eligible under this group. Spenddown is defined in the Handling of Excess Income (Spenddown) RU.

# Medically Needy Populations Based on Age, Blindness or Disability

MEDICAID | Medicaid State Plan | Eligibility | NC2021MS0002O | NC-21-0025

## Package Header

<b>Package ID</b>	NC2021MS0002O	<b>SPA ID</b>	NC-21-0025
<b>Submission Type</b>	Official	<b>Initial Submission Date</b>	12/28/2021
<b>Approval Date</b>	3/24/2022	<b>Effective Date</b>	10/1/2021
<b>Superseded SPA ID</b>	New		
	User-Entered		

## G. Additional Information (optional)



PRA Disclosure Statement: Centers for Medicare & Medicaid Services (CMS) collects this mandatory information in accordance with (42 U.S.C. 1396a) and (42 CFR 430.12); which sets forth the authority for the submittal and collection of state plans and plan amendment information in a format defined by CMS for the purpose of improving the state application and federal review processes, improve federal program management of Medicaid programs and Children's Health Insurance Program, and to standardize Medicaid program data which covers basic requirements, and individualized content that reflects the characteristics of the particular state's program. The information will be used to monitor and analyze performance metrics related to the Medicaid and Children's Health Insurance Program in efforts to boost program integrity efforts, improve performance and accountability across the programs. Under the Privacy Act of 1974 any personally identifying information obtained will be kept private to the extent of the law. According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0938-1188. The time required to complete this information collection is estimated to range from 1 hour to 80 hours per response (see below), including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: CMS, 7500 Security Boulevard, Attn: PRA Reports Clearance Officer, Mail Stop C4-26-05, Baltimore, Maryland 21244-1850.

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