

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 Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Mandatory Eligibility Groups	Unless the Eligibility Determinations for 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 Mandatory 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: <ul style="list-style-type: none"> • Add the primary RU to the package, complete it and validate it. • Alternatively, remove the secondary 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 <i>209(b) State</i> , or <i>SSI Criteria</i> or <i>1634 State</i> 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).	<ul style="list-style-type: none"> • 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.	<p>If the secondary RU will not display because the primary RU is neither approved in MACPro nor included in the package:</p> <ul style="list-style-type: none"> • 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 <i>209(b) State</i> , or <i>SSI Criteria</i> or <i>1634 State</i> 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).	<ul style="list-style-type: none"> • 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 Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Adult Group	If <i>209(b) State</i> is selected in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary), the following text displays in the Adult Group RU: <i>Note: In 209(b) states, individuals receiving SSI or deemed to be receiving SSI who do not qualify for mandatory Medicaid eligibility due to more restrictive requirements may qualify for this eligibility group if otherwise eligible.</i>	<ul style="list-style-type: none"> • If you change your election in section A of the primary RU from <i>209(b) State</i> to <i>Section 1634 State</i> or <i>SSI Criteria State</i>, you must include the secondary RU in the same submission package, as this statement should no longer display in 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	Eligibility Determinations and Fair Hearings	If <i>1634 State</i> is selected in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary), <i>A.2.iii.</i> of the Eligibility Determinations and Fair Hearings RU (secondary) needs to be selected to indicate that the Social Security Administration determines eligibility for SSI beneficiaries.	If 1634 State has been selected in the primary RU and the secondary RU does not already indicate that the Social Security Administration determines eligibility for SSI beneficiaries, include the secondary RU in the package and select <i>A.2.iii.</i>
Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Non-MAGI Methodologies	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 Non-MAGI Methodologies 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: <ul style="list-style-type: none"> • Add the primary RU to the package, complete it and validate it. • Alternatively, remove the secondary 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 <i>209(b) State</i> , or <i>SSI Criteria</i> or <i>1634 State</i> 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.	<ul style="list-style-type: none"> • 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 <i>209(b) State</i> 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.	<ul style="list-style-type: none"> • If you change your election in section A of the primary RU from <i>209(b) State</i> to <i>1634 State</i> or <i>SSI Criteria State</i>, 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 <i>209(b) State</i> , or <i>SSI Criteria</i> or <i>1634 State</i> 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.	<ul style="list-style-type: none"> • 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 Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Handling of Excess Income (Spenddown)	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 Handling of Excess Income (Spenddown) 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: <ul style="list-style-type: none"> • 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	Handling of Excess Income (Spenddown)	If <i>1634 State or SSI Criteria State</i> is selected in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary), the question at A.2. of the Handling Excess Income (Spenddown) RU (secondary) about including the retroactive period in the budget period will display.	<ul style="list-style-type: none"> • 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	Handling of Excess Income (Spenddown)	The selection of <i>209(b) State</i> , or <i>SSI Criteria</i> or <i>1634 State</i> 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 C of the Handling Excess Income (Spenddown) RU (secondary) with respect to deductions for incurred expenses.	<ul style="list-style-type: none"> • 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 Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Handling of Excess Income (Spendedown)	If <i>1634 State or SSI Criteria State</i> is selected in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary), an additional option will display at E.3. of the Handling Excess Income (Spendedown) RU (secondary) about expenses incurred earlier than the third month before the month of application.	<ul style="list-style-type: none"> 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	Individuals in 209(b) States Who Are Age 65 or Older or Who Have Blindness or a Disability	If <i>209(b) State</i> is selected in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary), the Individuals in 209(b) States Who Are Age 65 or Older or Who Have Blindness or a Disability RU (secondary) will be available for selection and for inclusion in the submission package in the Mandatory Eligibility Group RU.	<p>If the secondary RU is not included in the list of eligibility groups in the Mandatory Eligibility Group RU:</p> <ul style="list-style-type: none"> Add the primary RU to the package and change the selection to 209(b) State (provided this is the correct selection for the state). Save and validate the primary RU. Navigate to the Mandatory Eligibility Group RU and locate the secondary RU in the list.
Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Closed Eligibility Groups	Unless the Eligibility Determinations for Individuals Age 65 or Older or Who Have Blindness of a Disability RU (primary) has either been approved in MACPro or is included, completed and validated in the submission package, the Closed Eligibility Groups RU (secondary) cannot be displayed.	<p>If the secondary RU will not display because the primary RU is neither approved in MACPro nor included in the package:</p> <ul style="list-style-type: none"> 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	Closed Eligibility Groups	The selection of <i>209(b) State</i> , or <i>SSI Criteria</i> or <i>1634 State</i> as the basis for the eligibility determination in section A of	<ul style="list-style-type: none"> If you change your election in section A of the primary RU from <i>209(b) State</i> to <i>Section 1634 State</i> or <i>SSI</i>

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
Older or Who Have Blindness or a Disability		the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary) affects the requirements displayed at F.1.d. of the Closed Eligibility Groups RU (secondary) with respect to written application.	<p>Criteria State, you must include the secondary RU in the same submission package, as this change will affect the language at F.1.d. in the secondary RU.</p> <ul style="list-style-type: none"> The system will automatically include the correct language 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	More Restrictive Requirements than SSI under 1902(f) – 209(b) States	Unless 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 More Restrictive Requirements than SSI under 1902(f) – 209(b) States RU (secondary) cannot be displayed.	<p>If the secondary RU will not display because the primary RU is neither approved in MACPro nor included in the package:</p> <ul style="list-style-type: none"> 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	Ticket to Work Basic	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 Ticket to Work Basic RU (secondary) cannot be displayed.	<p>If the secondary RU will not display because the primary RU is neither approved in MACPro nor included in the package:</p> <ul style="list-style-type: none"> 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	Ticket to Work Basic	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	<ul style="list-style-type: none"> 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

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
		(primary) affects the requirements displayed in sections B and C of the Ticket to Work Basic RU (secondary) with respect to deductions for incurred expenses.	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	Ticket to Work Medical Improvements	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 Ticket to Work Medical Improvements 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: <ul style="list-style-type: none"> • 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	Ticket to Work Medical Improvements	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 Ticket to Work Medical Improvements RU (secondary) with respect to deductions for incurred expenses.	<ul style="list-style-type: none"> • 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	Individuals in Institutions Eligible under a Special Income Level	Unless the Eligibility Determinations for Individuals Age 65 or Older or Who Have Blindness of a Disability RU (primary) has either been approved in MACPro or is included, completed and validated in the submission package, the Individuals in Institutions Eligible	If the secondary RU will not display because the primary RU is neither approved in MACPro nor included in the package: <ul style="list-style-type: none"> • Add the primary RU to the package, complete it and validate it. 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 Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability	Individuals in Institutions Eligible under a Special Income Level	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 C of the Individuals in Institutions Eligible under a Special Income Level RU (secondary) with respect to financial methodology.	<ul style="list-style-type: none"> 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	Medically Needy Income Level	Unless the Eligibility Determinations for 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 Medically Needy Income Level RU (secondary) cannot be displayed.	<p>If the secondary RU will not display because the primary RU is neither approved in MACPro nor included in the package:</p> <ul style="list-style-type: none"> 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	Medically Needy Income Level	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), the state has an option to establish a separate income level for individuals who are 65 years old or older, have blindness or a disability.	<ul style="list-style-type: none"> 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	Medically Needy Resource Level	Unless the Eligibility Determinations for Individuals Age 65 or Older or Who	If the secondary RU will not display because the primary RU is neither

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
Individuals Age 65 or Older or Who Have Blindness or a Disability		Have Blindness or a Disability RU (primary) has either been approved in MACPro or is included, completed and validated in the submission package, the Medically Needy Resource Level RU (secondary) cannot be displayed.	approved in MACPro nor included in the package: <ul style="list-style-type: none"> • 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	Medically Needy Resource Level	If <i>209(b) State</i> is selected in section A of the Eligibility Determinations of Individuals Age 65 or Older or Who Have Blindness or a Disability RU (primary), the state has an option to have a separate resource level for individuals who are 65 years old or older, have blindness or a disability in the Medically Needy Resource Level RU (secondary).	<ul style="list-style-type: none"> • 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	Individuals Receiving State Plan Home and Community-Based Services	Unless the Eligibility Determinations for Individuals Age 65 or Older or Who Have Blindness of a Disability RU (primary) has either been approved in MACPro or is included, completed and validated in the submission package, the Individuals Receiving State Plan Home and Community-Based Services 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: <ul style="list-style-type: none"> • 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	Individuals Receiving State Plan Home and Community-Based Services	The selection of <i>209(b) State</i> , or <i>SSI Criteria</i> or <i>1634 State</i> 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 C of Individuals	<ul style="list-style-type: none"> • 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

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
		Receiving State Plan Home and Community-Based Services with respect to financial methodologies.	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	Medically Needy Populations Based on Age, Blindness or Disability	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 Medically Needy Populations Based on Age, Blindness or Disability 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: <ul style="list-style-type: none"> • 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	Medically Needy Populations Based on Age, Blindness or Disability	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 C of the Medically Needy Populations Based on Age, Blindness or Disability RU (secondary) with respect to financial methodology.	<ul style="list-style-type: none"> • 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 State Supplement Beneficiaries	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 State Supplement Beneficiaries 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: <ul style="list-style-type: none"> • Add the primary RU to the package, complete it and validate it. • Alternatively, remove the secondary 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	Optional State Supplement Beneficiaries	The selection of <i>209(b) State</i> , or <i>SSI Criteria</i> or <i>1634 State</i> 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.	<ul style="list-style-type: none"> 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.	<p>If the secondary RU will not display because the primary RU is neither approved in MACPro nor included in the package:</p> <ul style="list-style-type: none"> 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 <i>209(b) State</i> , or <i>SSI Criteria</i> or <i>1634 State</i> 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.	<ul style="list-style-type: none"> 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 Blindness or a Disability	Receiving Cash Assistance	(primary) has either been approved in MACPro or is included, completed and validated in the submission package, the Individuals Eligible for but Not Receiving Cash Assistance RU (secondary) cannot be displayed.	approved in MACPro nor included in the package: <ul style="list-style-type: none"> • 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	Individuals Eligible for but Not Receiving Cash Assistance	The selection of <i>209(b) State</i> , or <i>SSI Criteria</i> or <i>1634 State</i> 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 C of the Individuals Eligible for but Not Receiving Cash Assistance RU (secondary) with respect to financial methodologies.	<ul style="list-style-type: none"> • 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	Individuals Eligible for Cash Except for Institutionalization	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 Individuals Eligible for Cash Except for Institutionalization 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: <ul style="list-style-type: none"> • 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	Individuals Eligible for Cash Except for Institutionalization	The selection of <i>209(b) State</i> , or <i>SSI Criteria</i> or <i>1634 State</i> 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	<ul style="list-style-type: none"> • 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

Primary RU	Secondary RU	Nature of Dependency	Actions Needed
		(primary) affects the requirements displayed in section C of the Individuals Eligible for Cash Except for Institutionalization RU (secondary) with respect to financial methodologies.	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	Family Opportunity Act Children with a Disability	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 Family Opportunity Act Children with a Disability 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: <ul style="list-style-type: none"> • 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	Family Opportunity Act Children with a Disability	The selection of <i>209(b) State</i> , or <i>SSI Criteria</i> or <i>1634 State</i> 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 the Family Opportunity Act Children with a Disability RU (secondary) with respect to financial methodologies.	<ul style="list-style-type: none"> • 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.

INSTRUCTIONS

A. Eligibility Determinations of Individuals Who Are Age 65 or Older or Who Have 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.