

Using the ES-3104.6

Objective: These instructions help to walk a worker through completing and using the ES-3104.6. The 3104.6 is the form that is used to determine if a consumer remains eligible for a Protected Medical Group and includes the categories of Adult Disabled Child, Disabled Widows and Widowers, Early Widows and Widowers, and PICKLE determinations. This form needs to be completed every time someone identified as a potential PMG applies, whenever a PMG completes a review, or at COLA for any potential PICKLES or current PMG consumers. The ES-3104.6 can be accessed through the E&D forms in KFMAM.

Once a consumer has been identified as potentially eligible as a PMG based on the non-financial determinations, the 3104.6 will need to be completed to determine if the consumer is financially eligible.

For PICKLE eligible recipients:

1. Enter the current OASDI benefit into the first field. The current OASDI benefit is what the recipient currently receives from the Social Security Administration and can be found by accessing EATTS.
2. Calculate the current disregard for Pickles by multiplying the current OASDI benefit identified in Step 1 by the correct COLA Ratio listed in the table on the bottom of the 3104.6. The correct COLA Ratio for a consumer is identified by determining the date of their last SSI check. The end result is the number that gets entered on Line 2 on the 3104.6.

Example: A PICKLE eligible recipient receives their last SSI check in 8/15. The COLA Ratio according to the chart is .003. They currently receive OASDI of \$800. ($\$800 \times .003 = \2.40)

3. The consumer's countable OASDI is the result of Line 2 subtracted from Line 1. ($\$800 - \$2.40 = \$797.60$)
4. Any other gross unearned income is entered on Lines 4 and 5. This includes any other type of retirement or pension a consumer may receive, any type of payment from an annuity, a per capita payment, etc.
5. Gross Earned income is entered on Line 6. The gross earned income is entered as a monthly amount. This information can be found on the consumer's Income page. Be sure to use the converted monthly amount.
6. Add Lines 3 through 6 together to calculate the Total Income, entered onto Line 7.
7. Line 8 can be completed two different ways.
 - a. If the consumer does not have earned income, you will simply enter a SSI Disregard of \$20 on Line 8 and move on to Step 9.
 - b. If the consumer does have earned income, a separate form, the PA-3103.5 (located under the KEESM Forms section), will need to be completed. The 3103.5 helps the worker to calculate the total amount of SSI Disregard needs to be applied, based on the consumer's Earned and Unearned Income.
8. Once the 3103.5 is completed, the disregard amount calculated is entered on Line 8.
9. Calculate the total Countable Income by subtracting Line 8 from Line 7.

10. This result is compared to the SSI Benefit Level on the left side of the COLA Ratio table. The household composition is used to determine if the consumer is eligible or not.

(Example: The consumer has \$0 Earned Income, so the total Countable Income once the SSI Disregard of \$20 is subtracted would be \$777.60. The consumer lives in their own home or with a spouse that has no income. They would not qualify for a PICKLE as their Countable Income of \$777.60 exceeds the SSI Benefit Level of \$735.00.)

11. Once this form is complete, the worker will print it out, sign and date it, and scan and print it into the consumer's ImageNow.
12. The end result will be recorded under the consumer's most recent SSA income record by answering the questions for the Protected Medical Group of Pickle by answering all related questions.

Protected Medical Groups
Pickle
Since April 1977, has this person received or has been entitled to receive both RSDI and SSI in the same month?
Has this person been discontinued from SSI?
Does this person reside in the household of another and pay rent above the minimum threshold amount?
Has this person received a RSDI COLA increase in any month since SSI was discontinued?
Date eligible for and last received SSI:
Date RSDI (Social Security) Benefits began:

Note: These questions should be completed for both those who qualify as an Eligible Pickle and for those that do not qualify.

13. The end result of the PICKLE determination worksheet will be noted in the Journal based on the result.

Note: If the 3104.6 is being completed at COLA, include information on the determination in the Journal, but do not use the entries listed below. Refer back to the COLA instructions regarding SI Recipients Discontinued at COLA.

- a. Worker reviewed the consumer's PICKLE determination and completed the ES-3104.6. The consumer does not qualify as an eligible PICKLE and the most recent SSA Income record has been updated to show this. The consumer is now eligible for [list new medical assistance and any details related to the determination].
- b. Worker reviewed the consumer's PICKLE determination and completed the ES-3104.6. The consumer qualifies as an eligible PICKLE and the most recent SSA Income record has been updated to show this. The consumer is now eligible for [list new medical assistance and any details related to the determination].

For Adult Disabled Child recipients:

Adult Disabled Child nonfinancial eligibility is separate from that recipient's financial eligibility. Even if someone is considered an Adult Disabled Child through the Social Security Administration, it is no guarantee that they qualify non-financially or financially as an Adult Disabled Child through Medicaid.

To ensure the determination is being made correctly, a worker must review the Adult Disabled Child provisions found in KEESM 2683 as well as the recipient's financial eligibility through the 3104.6.

1. Enter the consumer's countable OASDI in the month before the month they lost their SSI on Line 3. (Lines 1 and 2 will not be completed on the 3104.6 for an Adult Disabled Child.)
Note: If a consumer has been determined to be an eligible ADC prior to this review/COLA, you may need to review ImageNow or OneNote to determine this amount. You may also review EATTS for this information.
2. Any other gross unearned income is entered on Lines 4 and 5. This includes any other type of retirement or pension a consumer may receive, any type of payment from an annuity, a per capita payment, etc.
3. Gross Earned income is entered on Line 6. The gross earned income is entered as a monthly amount. This information can be found on the consumer's Income page. Be sure to use the converted monthly amount.
4. Add Lines 3 through 6 together to calculate the Total Income, entered onto Line 7.
5. Line 8 can be completed two different ways.
 - a. If the consumer does not have earned income, you will simply enter a SSI Disregard of \$20 on Line 8 and move on to Step 9.
 - b. If the consumer does have earned income, a separate form, the PA-3103.5 (located under the KEESM Forms section), will need to be completed. The 3103.5 helps the worker to calculate the total amount of SSI Disregard needs to be applied, based on the consumer's Earned and Unearned Income.
6. Once the 3103.5 is completed, the disregard amount calculated is entered on Line 8.
7. Calculate the total Countable Income by subtracting Line 8 from Line 7.
8. This result is compared to the SSI Benefit Level on the left side of the COLA Ratio table. The household composition is used to determine if the consumer is eligible or not.

(Example: The consumer has \$0 Earned Income and a Countable OASDI of \$560.00, so the total Countable Income once the SSI Disregard of \$20 is subtracted would be \$540.00. The consumer lives in their own home or with a spouse that has no income. They would qualify financially as an Adult Disabled Child as their Countable Income of \$540.00 is less than the SSI Benefit Level of \$735.00.)

9. Once this form is complete, the worker will print it out, sign and date it, and scan and print it into the consumer's ImageNow.
10. The end result will be recorded under the consumer's most recent SSA income record by answering the questions for the Protected Medical Group of Adult Disabled Children by answering all related questions.

Disabled Adult Children

Is this person at least 18 years of age and previously received SSI on the basis of blindness or a disability which began before the person reached age 22?

Has this person been discontinued from SSI as a result of the individuals becoming entitled on or after July 1, 1987 to Social Security child's benefits payable increase in such childhood disability benefits?

Amount of Adult Disabled Child benefit in the month prior to the increase which caused loss of SSI:

Note: These questions should be completed for both those who qualify as a financially eligible Adult Disabled Child and for those that do not qualify.

11. The end result of the Adult Disabled Child determination worksheet will be noted in the Journal based on the result.

Note: If the 3104.6 is being completed at COLA, include information on the determination in the Journal, but do not use the entries listed below. Refer back to the COLA instructions regarding SI Recipients Discontinued at COLA.

- a. Worker reviewed the consumer's ADC determination and completed the ES-3104.6. The consumer does not qualify financially as an Adult Disabled Child and the most recent SSA Income record has been updated to show this. The consumer is now eligible for [list new medical assistance and any details related to the determination].
- b. Worker reviewed the consumer's ADC determination and completed the ES-3104.6. The consumer qualifies as an Adult Disabled Child and the most recent SSA Income record has been updated to show this. The consumer is now eligible for [list new medical assistance and any details related to the determination].

Note: Another category of recipients called Qualifying Disabled Widows and Widowers will also use the same steps listed above as the Adult Disabled Child recipients. Please refer to KEESM 2682 for more information regarding this category of recipients.

For Early and Disabled Widow and Widower recipients:

Please refer to KEESM 2684 for more detailed information on the general eligibility requirements for a consumer that qualifies for the Early or Early Disabled Widow and Widower benefits.

Note: If an individual qualifies as an Early or Early Disabled Widow or Widower, these benefits end once a consumer turns 65 or becomes eligible for Medicare Part A, whichever occurs first.

1. Enter the total of the consumer's nonexempt income (except the widow/widower benefit) on Lines 4 and 5 of the 3104.6. This includes any other type of retirement or pension a consumer may receive, any type of payment from an annuity, a per capita payment, etc.
2. Gross Earned income is entered on Line 6. The gross earned income is entered as a monthly amount. This information can be found on the consumer's Income page. Be sure to use the converted monthly amount.
3. Add Lines 3 through 6 together to calculate the Total Income, entered onto Line 7.
4. Line 8 can be completed two different ways.
 - a. If the consumer does not have earned income, you will simply enter a SSI Disregard of \$20 on Line 8 and move on to Step 9.
 - b. If the consumer does have earned income, a separate form, the PA-3103.5 (located under the KEESM Forms section), will need to be completed. The 3103.5 helps the worker to calculate the total amount of SSI Disregard needs to be applied, based on the consumer's Earned and Unearned Income.
5. Once the 3103.5 is completed, the disregard amount calculated is entered on Line 8.

6. Calculate the total Countable Income by subtracting Line 8 from Line 7.
7. This result is compared to the SSI Benefit Level on the left side of the COLA Ratio table. The household composition is used to determine if the consumer is eligible or not.

(Example: The consumer has \$0 Earned Income and Other Gross Income totaling \$670.00, so the total Countable Income once the SSI Disregard of \$20 is subtracted would be \$650.00. The consumer lives in the household of another. They would not qualify financially as an Early or Early Disabled Widow or Widower as their Countable Income of \$650.00 is greater than the SSI Benefit Level of \$490.00.)

8. Once this form is complete, the worker will print it out, sign and date it, and scan and print it into the consumer's ImageNow.
9. The end result will be recorded under the consumer's most recent SSA income record by answering the questions for the Protected Medical Early Widow/Widower by answering all related questions.

Early Widow/Widower

Is this person receiving OASDI widow or widower's benefit under section 202I or 202(f) of the Social Security Act?

Is the person 60 years old or between the ages of 50 and 60 and are disabled?

Did the person lose SSI eligibility because they began to receive early widow or widower benefit?

Would the person be eligible for SSI currently if the amount of widow or widower benefits were disregarded?

Is this person not currently eligible for Medicare Part A coverage?

Note: These questions should be completed for both those who qualify as a financially eligible Adult Disabled Child and for those that do not qualify.

10. The end result of the Early Widow/Widower determination worksheet will be noted in the Journal based on the result.

Note: If the 3104.6 is being completed at COLA, include information on the determination in the Journal, but do not use the entries listed below. Refer back to the COLA instructions regarding SI Recipients Discontinued at COLA.

- c. Worker reviewed the consumer's EW determination and completed the ES-3104.6. The consumer does not qualify financially as an Early Widow/Widower and the most recent SSA Income record has been updated to show this. The consumer is now eligible for [list new medical assistance and any details related to the determination].
- d. Worker reviewed the consumer's EW determination and completed the ES-3104.6. The consumer qualifies as an Early Widow/Widower and the most recent SSA Income record has been updated to show this. The consumer is now eligible for [list new medical assistance and any details related to the determination].