

# CHANGE NOTICE FOR MANUAL

**DATE:** November 20, 2002

**Manual:** State/County Special Assistance for Adults

**Change No:** **07-02**

**To:** County Directors of Social Services

**Effective:** **December 1, 2002**

---

## **I. CONTENT OF CHANGES TO SA-3200, RESOURCES**

### **A. Exclusion of Real and Personal Property During Reasonable Attempts to Sell**

SA-3200, Resources is expanded to include procedures for excluding real and personal property when the applicant/recipient is attempting to sell the property. To be eligible for this exclusion, the applicant/recipient's liquid resources must be less than the current resource limit. This policy is consistent with SSI policy.

Personal property may be excluded for up to 3 months (with an additional 3 month extension with good cause) while the applicant/recipient makes a reasonable effort to sell. At the end of the exclusion period, the personal property becomes a countable resource if it is not sold.

Real property may be excluded for up to 9 months while the applicant/recipient makes a reasonable effort to sell. If the real property cannot be sold during the exclusion period, the property continues to be excluded as long as it remains available for sale.

The applicant/recipient must sign an "Agreement to Sell Property" agreeing to repay the Special Assistance benefits received during the exclusion period if the property is sold,

### **B. Exclusion of Jointly Owned Property Due to Undue Hardship**

Real property that is jointly owned with an individual other than a spouse (tenancy-in-common) may be excluded if the other owner lives on the property and sale of the property would cause undue hardship to the other owner due to loss of housing.

C. Homesite Exclusion

The homesite exclusion for "intent to return home" is expanded and clarified. If the applicant/recipient is mentally competent and the statement is not self-contradictory, always accept the statement of intent to return home regardless of other circumstances such as the applicant/recipient's age, physical condition or mental capacity. This statement supercedes all other statements, and there is no time limit on this exclusion.

If the applicant/recipient has been found incompetent, or if his statement is self-contradictory, obtain the statement of intent to return home from the representative (legal guardian, power of attorney, family member). This exclusion is intended to allow applicant/recipients to receive services and benefits without having to dispose of their homesite.

In addition, the list of relatives for whom property can be excluded is expanded to be consistent with SSI and Medicaid.

D. The Resource Exclusion Chart is updated to reflect recent changes in resources policy. The Table of Contents is also updated.

**II. EFFECTIVE DATE – DECEMBER 1, 2002**

**III. IMPLEMENTATION**

Apply this change to all applications in process on or taken on or after December 1, 2002, when determining eligibility for any month December 2002 or later. For ongoing cases, apply this change at the next redetermination or change in situation.

**IV. MAINTENANCE OF MANUAL INSTRUCTIONS**

Remove: SA-3200, Table of Contents

Insert: SA-3200, Table of Contents

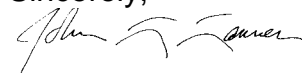
Remove: SA-3200, pages 3-6, 21-22, 29-41

Insert: SA-3200, pages 3-6, 21-22, 29-46, and Figure 4

Online Manual: Revise Sections II., V.A. and VI.

If you have any questions regarding this information, please contact your Adult Programs Representative or Jackie Franklin, SA Program Consultant, at 919-733-3677.

Sincerely,



John T. Tanner, Chief  
Adult and Family Services Section