



HUMAN SERVICES  
DEPARTMENT

Susana Martinez, Governor  
Brent Earnest, Secretary  
Sean Pearson, Deputy Secretary

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## General Information Memorandum

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**ISD GI 17-06**

**TO:** ISD Employees

**FROM:** Sean Pearson, Deputy Secretary, Human Services Department 

**RE:** Elderly and Disabled Desk Guide

**DATE:** May 25, 2017

The attached Elderly and Disabled Desk Guide has been created to assist field staff when coding and troubleshooting elderly and disabled household cases. This will ensure that ASPEN will evaluate the case based on the net income test even if the household is over gross income and the correct notice will be sent if the case denies.

If you have any questions regarding this GI, please contact Lee Cabeza de Vaca, Training Staff Manager at [Lee.CabezadeVaca@state.nm.us](mailto:Lee.CabezadeVaca@state.nm.us) or (505) 383-2009.

Attachment:  
Elderly and Disabled Desk Guide

**Purpose**

The purpose of this guide is to assist you in ensuring information is correctly entered in **Data Collection** for households with Elderly/Disabled members. Specific ASPEN pages involved in this process include the **Individual Information** page (DOB), the **Aged/Disabled Benefits** page, and the **Disability Benefits** page.

If data is correctly entered on these pages, the correct case action will be triggered. For instance, a correct SNAP eligibility determination avoids incorrect case actions and incorrect benefit issuances. This also ensures the household's eligibility is solely based upon the NET income standards.

**8.139.100.7 (A)(28)(a) (b) NMAC Elderly or disabled member**

**Elderly:** means an individual 60 years or older.

**Disabled:** means a person who meets any of the following standards:

- receives supplemental security income (SSI) under title XVI of the Social Security Act or disability or blindness payments under titles I, II, X, XIV, or XVI of the Social Security Act;
- receives federally or state administered supplemental benefits under section 1616a of the Social Security Act, provided that the eligibility to receive the benefits is based on disability or blindness criteria used under title XVI of the Social Security Act

**8.139.520.8 (A) NMAC Elderly/disabled households**

Households which contain an elderly or disabled member, as defined by **8.139.100 NMAC**, definitions, must meet the net income standards listed in Subsection E of **8.139.500.8 NMAC**.

**The following charts will help you determine how to code the pages in ASPEN depending on the type of RSDI benefit:**

**Receiving RSDI Due to Being Elderly or Disabled (Elderly = 60 Years of Age or Older)**

In the **Individual Information** page entering the correct Date of Birth (DOB) is important to ASPEN has the correct age for the applicant.

- In the **Other Information** section, click the **Does the Individual have Social Security Claim Number (SSCN or Railroad Retirement Number (RRN))?** Dropdown list and select **YES** if appropriate.
- The **Medicare Claim Number** needs to be entered on the **Individual SSCN** page. Make sure the **Medicare Claim Number** is correct based on SOLQ. This can be an issue with **dual claims** because SOLQ doesn't always pull all the claim numbers or RSDI income you need.

- In the **Individual > Questions** page (**Disability Section**), click the **Does anyone in the case claim to be disabled?** Dropdown list, and select **YES** if appropriate.
- On the **Aged/Disability** section, click the **Is there anyone in the case receiving or applying for aged disability benefits such as SSI or RSDI?** Dropdown list and select **YES** if appropriate.

**Receiving RSDI (Retirement, Survivors, and Disability Insurance) Benefits on Behalf of Spouse or Parent, and the Recipient is not Elderly or Disabled**

In the **Individual Information** page (**Other Information Section**), answer **Does the Individual have Social Security Claim Number (SSCN) or Railroad Retirement Number (RRN)?** Dropdown list, and select **YES**.

In the **Individual > Questions** page, **DO NOT** answer this question if it does not apply to the child or spouse receiving the RSDI benefit.



In the **Questions – Income** section (**unearned Income Section**) click the **Does anyone in the case receive money from any other source?** dropdown list, and select **YES**.

**Note:** Since the **Unearned Income** will be coded as RSDI, the **Claim Number** is required.

## Elderly/Disabled in Data Collection

This date should be the same as what shows on the SOLQ report.

## Elderly/Disabled Information in EDBC

On the Eligibility Summary page, click on the SNAP ongoing EDG hyperlink to verify whether ASPEN is correctly coding the case based on the data entered as Aged/Disabled. Located near the center of the page, the Aged/Disabled Edg should be coded YES.

On the same page, the Exemption/Reason will read as follows if ASPEN is coding the Individual as Aged or Disabled:

|     |                                |   |      |                |          |                                      |
|-----|--------------------------------|---|------|----------------|----------|--------------------------------------|
| EDG | <a href="#">Gullen, Benito</a> | Y | Self | Eligible Adult | Deferred | 60 years of age or older             |
| EDG | <a href="#">Gullen, Benito</a> | Y | Self | Eligible Adult | Deferred | Mentally or physically unfit to work |

On the Net Income tab, ASPEN will code the Net Income as Pass.

Once you have verified all information is correct, you may proceed with Certifying the Case, Entering Case Comments, and Reviewing Correspondence. It is important to note information on Notice Tab Reasons and what shows on the Notice of Case Action results will sometimes not be the same. It is isn't, a Cherwell Ticket needs to be created.

## Common Issues Known To Exist

- Case denying on gross income versus net income 8.139.520.8 (A) NMAC Elderly/disabled households
- Spouse or Child receiving survivor's benefits but not elderly or disabled
- Notice of Case Action – Eligibility Summary shows case is denying on Net Income, however correspondence shows COE denying on Gross Income.
- If the NOCA Income table shows the denial is due to Gross Income, do not suppress the notice. Create a Cherwell Ticket.