**DATE: March 22, 2023**

**OPERATIONS MEMORANDUM #23-03-02**

**SUBJECT:** State Blind Pension (SBP) PA 21-BI SBP Computation Sheet Revision and SBP Calculation Tool Introduction

**TO:** Executive Directors

**FROM:**  Tanoa Fagan

Director

Bureau of Operations

**PURPOSE**

To inform County Assistance Offices (CAOs) of the revised PA 21-BI SBP Computation Sheet for determining SBP eligibility and monthly benefit amount at application, renewal, and changes. To introduce the SBP Calculation Tool that can be used to complete the PA 21-BI SBP Computation Sheet. To provide CAOs with proper notice text for use in authorizing, rejecting, closing, or changing SBP benefits.

**BACKGROUND**

An individual who meets the non-financial criteria for SBP must be within the resource and income limits to qualify. The CAO must manually determine eligibility for all SBP cases using the PA 21-BI SBP Computation Sheet. The SBP is processed through a “Special Program Request” in the Electronic Client Information System.

**DISCUSSION**

Income and resources are not system evaluated when eligibility is run for SBP budgets. Income Maintenance Caseworkers must complete the revised PA 21-BI SBP Computation Sheet (found in DocuShare) to determine financial eligibility and compute the monthly benefit amount. The PA 21-BI SBP Computation Sheet is maintained in the case record at application, renewal and when reported changes in resources or income are reviewed. There is a new SBP Calculation Tool ([Attachment 1](https://pagov.sharepoint.com/sites/DHS-OIM/Attachments/Attachment%201%20OPS%2023-03-02-%20State%20Blind%20Pension%20Calculation%20Tool.xlsx)) found in CAO Resources to assist in computing the monthly benefit if needed.

When eligibility is run, the system defaults to pass for SBP budgets. When an individual is not eligible for SBP the CAO must override the pass result to fail and send the proper manual notice, see [Attachment 2](https://pagov.sharepoint.com/sites/DHS-OIM/Attachments/Attachment%202%20OPS%2023-03-02%20-%20State%20Blind%20Pension%20Notice%20Text.docx).

**PROCEDURES**

Processing for SBP cases:

* Determine eligibility manually using the PA 21-BI SBP Computation Sheet, found in DocuShare. The completed form must be maintained in the case record.

**NOTE:** The CAO may use the SBP Calculation Tool found in CAO Resources to assist in computing the monthly benefit on the PA 21-BI SBP Computation Sheet.

* In Case Open or Program Add mode, workers need to select the Special Category “SB-State Blind Pension” on the Case Non-Financial Screen under “Program Request Questions”. If there is no Medical Assistance (MA) selected for processing, they will be prompted by a red edit message to return to the “Program Request” screen to add an MA request.
* MA eligibility will be correctly evaluated based on the information entered in the case.
* Narrate reasons for all case actions to include eligibility, ineligibility, or discontinuance determination in case comments.
* The CAO must send a manual notice using the appropriate text found in [Attachment 2](https://pagov.sharepoint.com/sites/DHS-OIM/Attachments/Attachment%202%20OPS%2023-03-02%20-%20State%20Blind%20Pension%20Notice%20Text.docx). A copy of the manual notice must be maintained in the case record.

**NEXT STEPS**

1. Review this Operations Memorandum with staff.
2. Contact your Area Manager if you have any questions.
3. Operations Memorandum will be obsoleted when incorporated into Supplemental Handbook 700.

**ATTACHMENTS**

[Attachment 1: State Blind Pension Calculation Tool](https://pagov.sharepoint.com/sites/DHS-OIM/Attachments/Attachment%201%20OPS%2023-03-02-%20State%20Blind%20Pension%20Calculation%20Tool.xlsx)

[Attachment 2: State Blind Pension Notice Text](https://pagov.sharepoint.com/sites/DHS-OIM/Attachments/Attachment%202%20OPS%2023-03-02%20-%20State%20Blind%20Pension%20Notice%20Text.docx)