

MANUAL MATERIAL TRANSMITTED					
MANUAL: INCOME MAINTENANCE			CHANGE NUMBER: 16		
DELETE			INSERT OR CHANGE		
PAGES	CHAPTER	DATED	PAGES	CHAPTER	DATED
Appendix A	10	10/95	Appendix A	10	2/96
25 - 26	17	9/95	25 - 26	17	2/96
DATE: December, 1995			TO: All Income Maintenance Manual Holders		

This change is being made as a result of the annual update of some amounts related to the community spouse for nursing care cases. These are effective February 1, 1996.

The minimum community spouse asset limit is \$15,348; the maximum is \$76,740.

The maximum CSMA is \$1,919. The minimum amount is not due to change again until July, 1996.

Those nursing cases which receive the current maximum CSMA must be reevaluated to see if they qualify for a higher CSMA based on the new maximum amount. This must be done in January, effective February and the change will require cases not yet converted to the new policy to be converted. We are having a printout produced which will identify all nursing care cases with a community spouse. We are unable to determine who receives the maximum deduction, but are doing some screening for the printout based on amounts in Block 69 for cases converted to the new policy and Block 53 for cases not converted to the new policy. For cases not yet converted, we cannot determine exactly who receives the maximum deduction, but we know that if Block 53 is below the former maximum there is no need to examine it. The printout will be mailed to the CSM's as soon as it is available. We will send an office automation notice to all RA's, CSM's, Coordinators and Supervisors when the printout is being mailed.

The SAS system is being updated with the new amounts.

Questions should be directed to the IM Policy Unit in the Office of Family Support.

APPENDIX A - INCOME LIMITS

NUMBER OF PERSONS	100% FPL	120% FPL	133% FPL	150% FPL	185% FPL	200% FPL	300% FPL	C/U PAY-MENT	C/U 100% SON	C/U 185% SON	TRIP
1	623	747	828	934	1,152	1,245	1,868	149	581	1,075	478
2	836	1,003	1,112	1,254	1,547			201	786	1,454	707
3	1,050		1,396	1,574	1,941			253	991	1,833	757
4	1,263		1,680	1,894	2,336			312	1,196	2,212	807
5	1,476		1,963	2,214	2,731			360	1,401	2,592	857
6	1,690		2,247	2,534	3,125			413	1,606	2,971	907
7	1,903		2,531	2,854	3,520			462	1,811	3,350	957
8	2,116		2,815	3,174	3,915			477	2,016	3,729	1,007
9	2,330		3,098	3,494	4,309			477	2,221	4,108	1,057
10	2,543		3,382	3,814	4,704			477	2,426	4,487	1,107

NUMBER OF PERSONS	MAXIMUM COUPON ALLOTMENT	FOOD STAMP GROSS/NET TEST			MNIL		QMB	SLIMB	SSI MAX	EMER. ASST.	LIEAP
		GROSS	NET	E & D	1 Mo.	6 Mos.					
1	119	810	623	1,028	200	1,200	623	624-747	470	355	685
2	218	1,087	836	1,380	275	1,650	836	837-1,003	705	533	920
3	313	1,364	1,050	1,732	290	1,740				566	1,155
4	397	1,642	1,263	2,084	312	1,872				711	1,389
5	472	1,919	1,476	2,436	360	2,160				819	1,624
6	566	2,196	1,690	2,788	413	2,478				939	1,859
7	626	2,474	1,903	3,140	461	2,766				1,046	2,093
8	716	2,751	2,116	3,492	477	2,862				1,165	2,328
9	806	3,029	2,330	3,844	527	3,162				1,273	2,563
10	896	3,307	2,544	4,196	547	3,462				1,394	2,797

NURSING HOMES

Min. CSMA - \$1,254

Max. CSMA - \$1,919

MAX. FMA/each - \$418

OLE - \$175

NURSING CARE SERVICES

17.10 ASSETS

A nursing care client must meet the asset test for his coverage group. See Chapter 11 for the appropriate coverage group.

Once the Worker determines the value of the assets, there are additional procedures that apply to nursing care clients.

A. ASSET ASSESSMENTS

When determining eligibility for nursing care services for an individual, institutionalized on or after 9/30/89, who has a community spouse, the Worker must complete an assessment of the couple's combined countable assets. The assessment is completed, when requested by the client or his representative, prior to application, or at application, if not previously completed. It is completed as of the first continuous period of institutionalization and is completed one time only.

The assessment is done on Form ES-NL-AC-1. The purpose of the spousal asset assessment is to allow the spouse of an institutionalized individual to retain a reasonable portion of the couple's assets.

When requested, the Worker must advise the individual(s) of the documentation required for the assessment. Verification of ownership and the CMV must be provided. When it is not provided, the assessment is not completed.

The Worker documents the total value of all non-excluded assets.

Nursing facilities are required to advise all new admissions and their families that asset assessments are available upon request from the county office. The agency has developed a statement concerning the availability of asset assessments. Nursing facilities provide this "Patient's Bill of Rights" as part of their admission package. See Appendix C.

1. Calculation Of The Spouses' Shares

The spouses' shares are computed as follows:

Step 1: Determine the CMV of the couple's combined countable assets, as of the beginning of

NURSING CARE SERVICES

institutionalization.

- Step 2: Compare the amount from Step 1 to \$15,348. If the Step 1 amount is equal to or less than \$15,348, all assets are attributed to the community spouse. If not, go to Step 3.
- Step 3: Divide the Step 1 amount by 2 and compare to \$15,348. If one-half of the Step 1 amount is equal to or less than \$15,348, the community spouse is attributed \$15,348 and the remainder belongs to the institutionalized spouse. If not, go to Step 4.
- Step 4: When one-half of the Step 1 amount is greater than \$15,348, one-half of the total assets (Step 1 amount) is attributed to the community spouse, not to exceed \$76,740.
- Step 5: The amount not attributed to the community spouse is attributed to the institutionalized spouse.

If an application for nursing care services is not made when the assessment is completed, the spouse retains the amount attributed to him at the assessment, regardless of the couple's combined assets at the time of application.

2. Notification Requirements

When the assessment is complete, the Worker must provide each member of the couple with a copy of the ES-NL-AC-1. A copy is retained in the case record. The assessment is entered in the SAS system for future reference. See item 7 below.

The Worker must also notify the community spouse using form ES-NL-D that the assessment may not be appealed until a Medicaid application is made.

3. Revisions To The Asset Assessment

The asset assessment may be revised when the client, his spouse, the Hearings Officer or the Worker determine, with supporting documentation, that the