MEDICAID COMMUNICATION NO: 07-02 DATE: February 14, 2007

TO: County Welfare Agency Directors
    Institutional Services Section (ISS) Area Supervisors
    Statewide Eligibility Vendor

SUBJECT: Adjustment to Spousal Impoverishment Resource Eligibility Figures

The Centers for Medicare and Medicaid Services (CMS) have just advised this Agency of the new resource figures to be used in determining resource eligibility of an institutionalized adult when he or she has a spouse in the community. These new amounts are effective January 1, 2007.

The new minimum community spouse's share of resources is $20,328.00, and the maximum is $101,640.00, increasing from $19,908.00 and $99,540.00 respectively. These new figures are to be used, beginning with the month of January, 2007, in the determination of the community spouse's share and resource eligibility for all institutional cases when there is a community spouse. The new amounts apply to any case which has not yet been determined eligible, regardless of the date of application. The new figures apply even if the community spouse's share had been determined in a previous resource assessment.

Example: Mr. Smith entered a long term care facility on October 15, 2006. He and his wife had combined resources of $200,000.00. The community spouse’s share of the resources would have been established at $99,540.00 at the time of the resource assessment. Because the Smith’s resources still exceed $101,540.00 (the community spouse’s share plus the $2,000.00 resource limit), Mr. Smith has not yet attained Medicaid eligibility. Beginning January 1, 2007, the community spouse's share in this case will increase to $101,640.00. Resource eligibility will exist once the Smith’s countable resources are equal to or less than $103,640.00
Should you have any questions regarding this information, please contact the field staff assigned to your county at 609-588-2556.

Sincerely,

[Signature]
Ann Clemency Kohler
Director

ACK: Mm

c:  William Ditto, Director
    Division of Disability Services

    Greg Fenton, Acting Director
    Division of Developmental Disabilities

    Kevin Martone, Assistant Commissioner
    Division of Mental Health Services

    Jeanette Page-Hawkins, Director
    Division of Family Development

    Eileen Crummy, Director
    Division of Youth and Family Services
    Department of Children and Families

    Fred M. Jacobs, M.D., J.D., Commissioner
    Kathleen M. Mason, Assistant Commissioner
    Department of Health and Senior Services
REISSUED April 2, 2007

Resource amount used in example-revised from $200,000.00 to $300,000.00
Please destroy original issuance

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Example: Mr. Smith entered a long term care facility on October 15, 2006. He and his wife had combined resources of $300,000.00. The community spouse's share of the resources would have been established at $99,540.00 at the time of the resource assessment. Because the Smith's resources still exceed $101,540.00 (the community spouse's share plus the $2,000.00 resource limit), Mr. Smith has not yet attained Medicaid eligibility. Beginning January 1, 2007, the community spouse's share in this case will increase to $101,640.00. Resource eligibility will exist once the Smith's countable resources are equal to or less than $103,640.00.
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Sincerely,

John R. Guhl
Director

JRG:Mm
c: Jennifer Velez, Acting Commissioner
Department of Human Services

William Ditto, Executive Director
Division of Disability Services

Kevin Martone, Assistant Commissioner
Division of Mental Health Services

Jeanette Page-Hawkins, Director
Division of Family Development

Kenneth W. Ritchey, Assistant Commissioner
Division of Developmental Disabilities

Eileen Crummy, Director
Division of Youth and Family Services
Department of Children and Families

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Kathleen M. Mason, Assistant Commissioner
Department of Health and Senior Services