



Date: _____

Request for Assessment Form

Institutionalized Spouse's Name: _____

Address: _____

Telephone Number: _____

Community Spouse's Name: _____

Current Address: _____

Telephone Number: _____

/we request an assessment of the items checked below:

- Couple's countable resources and the community spouse resource allowance
- Community spouse monthly income allowance
- Family member allowance(s)

Check if you are a representative acting on behalf of either spouse. Please call your local department of social services if we do not contact you within 10 days of this request.

NOTE: If an assessment is requested without a Medicaid application, the local department of social services may charge up to \$25 for the cost of preparing and copying the assessment and documentation.

Signature of Requesting Individual

Address and telephone # if different from above

POLICY & BILLING GUIDANCE

Spousal Impoverishment Income and Resource Amounts

Federal Maximum Community Spouse Resource Allowance

\$115,920 – January 1, 2013

NOTE: A higher amount may be established by court order or fair hearing to generate income to raise the community spouse's monthly income up to the maximum allowance.

NOTE: The State Minimum Community Spouse Resource Allowance is \$74,820.

Community Spouse Minimum Monthly Maintenance Needs Allowance

is an amount up to: \$2,898 – January 1, 2013

if the community spouse has no income of his/her own.

NOTE: A higher amount may be established by court order or fair hearing due to exceptional circumstances that result in significant financial distress.

Family Member Allowance

for each family member is an amount up to: \$631 – January 1, 2013

if the family member has no income of his/her own.

NOTE: The maximum family member allowance is subject to change when the Federal Poverty Levels for 2013 are published in the *Federal Register*.

If the institutionalized spouse is receiving Medicaid, any change in income of the institutionalized spouse, the community spouse, and/or the family member may affect the community spouse income allowance and/or the family member allowance. Therefore, the social services district must be promptly notified of any income changes.