

Virginia Department of Social Services
Medicaid Fact Sheet #2
MEDICAID LONG-TERM CARE RESOURCE ASSESSMENTS

The following information is given as a guideline only. In order to determine Medicaid eligibility, an application must be filled with the local department of social services in the area in which you live.

The Medicare Catastrophic Coverage Act of 1988 made several changes to the policy for determining Medicaid eligibility of institutionalized individuals (in a nursing facility or in a hospital for 30 days or longer) who have a spouse living in the community. These changes affect you if you were institutionalized on or after September 30, 1989. Individuals who were admitted to medical facilities prior to September 30, 1989, must be evaluated under other rules.

If you are a married patient in a medical facility and your spouse is not in a medical facility, you or your spouse can request a resource assessment without applying for Medicaid. When an individual is admitted to a medical facility and has a community spouse (spouse at home) that individual or the community spouse may request a resource assessment. The resource assessment is not an application for Medicaid. It is a calculation of how much money and property the couple has at the time one spouse enters a long-term care facility and the spousal share of those resources (one-half). This amount will be used later if a Medicaid application is filed.

The resource assessment is completed and kept on file by the local department of social services (DSS). You do not need to file an application for Medicaid when requesting the resource assessment; however, a resource assessment will be done if you apply for Medicaid. You will receive a written notice of the resource assessment results.

When doing a resource assessment all resources are listed, although some resources are not counted. Resources are real property, bank accounts (such as savings, checking, certificates of deposit), bonds stocks, etc. The resources that are not counted are:

- the home occupied by the community spouse and all adjoining property,
- all household goods, regardless of value or use,
- one automobile, regardless of value.

MEDICAID FACT SHEET #2 MEDICAID LONG-TERM CARE RESOURCE
ASSESSMENT

FORM NUMBER - d032-03-0826-04-eng

PURPOSE OF FORM - The local agency workers may distribute this form to provide customers with basic policy information regarding resource assessments.

NUMBER OF COPIES - One

DISPOSITION OF FORM - One per inquirer.

INSTRUCTIONS FOR PREPARATION OF FORM - To print this form, first print position should be 7, line spacing should be b, and pitch should be 10.