

Simplification of Documentation & Verification for Community Based Programs

PROGRAM CRITERIA

Use this procedure for community based programs including:

- All COLA disregard programs such as Pickle, DAC, Widow/Widower
- All Medicare Savings Programs
- The Community Attendant (CA) services program

Do not use this procedure when an individual is applying for or requesting a program transfer to

- an institution
- a 1915(c) Home and Community Based Waivers services, or
- MBI

NON-FINANCIAL CRITERIA

A WTPY/SOLQ must be requested. This will verify the SSN, SSCN and Medicare Part A or B. Citizenship and identity are met if eligible for Medicare.

INCOME

Verify RSDI amounts via WTPY/SOLQ. Accepted the individual's statement for other types of income, including VA, CSA, earnings, etc..

Request the individual to verify all income if the:

- individual cannot provide the gross amount of income
- total countable income is within \$10 of the income limit

Do not verify interest unless questionable, since most interest is not countable in the eligibility budget.

RESOURCES

Accept the individual's statement regarding resources.

Request the individual to verify resources if the:

- Individual's statement does not sound reasonable, or
- Total countable resources are within \$100 of the resource limit

WAIVER SETTING OR NURSING FACILITY ENTRY

If the Community Based client goes into a Title XIX approved facility or into a 1915(c) waiver setting, verify the income for applied income/copay purposes. Verify resources for transfer of assets and substantial home equity. If there is a community spouse, verify all elements for spousal treatment.

STATEMENT STANDARD

If an individual is "not sure" about income or resources, verify the information. On verification requests, document the reason for the request. Assist in the process by requesting verification from third parties if applicable.