**Policy Clarifications –**

**Medicaid - LTC**

**PMN-19229-440**

**Submitted: 1/17/2019 Agency: CAOs**

**Subject: When to complete a Resource Assessment (RA)**

**Question**: Should the CAO complete an RA for an institutionalized spouse (IS) each time the IS is admitted to a long-term care (LTC) facility or is assessed as functionally eligible for Home and Community-Based Services (HCBS)?

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| **Response By: Division of Health Services** | **Date: 1/17/2019** |

No. If an RA was completed for an IS either at initial admission to an LTC facility or when initially assessed as functionally eligible for HCBS, the CAO is not to complete additional RAs based on the IS having been discharged and later readmitted to an LTC facility or later being re-assessed as HCBS functionally eligible.

A resource assessment should be completed when a married person is first admitted to an LTC facility for at least thirty consecutive days or is assessed as functionally eligible for HCBS regardless of whether he is applying for MA LTC. Either spouse, or a person acting on behalf of either spouse, may request the assessment. If no assessment was previously completed and the person is applying for MA LTC, the CAO will complete the assessment as part of the application process.

Policy Clarification 19134-440 has been obsoleted.

Further guidance on when to complete an RA is found in LTC Handbook Sections 440.9 and 440.91.