



Estate Preservation Network®

Protecting *tomorrow's* legacy. Today.

The Texas Medicaid Eligibility "Three Box Checklist" January, 2017

MEDICAL NECESSITY & OTHER

Medical Need- must meet medical necessity criteria or ICF MR level of care criteria.

Risk Assessment- must meet risk of admission to a nursing facility criteria.

Residency- must be a resident of Texas and U.S. citizen or alien with approved status (e.g., legalized or permanent resident alien).

Living Arrangement- must be a patient in a Medicaid-contracted long term care facility for 30 consecutive days.

INCOME

MAXIMUM Gross Income- For an Individual(and individual with an ineligible spouse): **\$ 2,205.00** per month

For a Couple (Only if Both Spouses will be applying for Medicaid at the SAME TIME): **\$ 4,410.00** per month

What Counts as Income ?

- | | |
|-------------------------------|--------------------------------------|
| " Social Security Benefits | " Civil Service Annuities |
| " Veterans Benefits | " Railroad Benefits |
| " Private Pension Benefits | " State or Local Retirement Benefits |
| " Interest or Dividends | " Gifts or Contributions |
| " Royalty and Rental Payments | " Earnings or Wages |

RESOURCES

MAXIMUM Countable Resources: For an Individual: **\$2,000**

For a Couple (Only if BOTH SPOUSES are in the Nursing Home at the Same Time): **\$3,000**

What is a Resource ?

- | | | | |
|--------------------------|-------------------------|-------------------------|----------------------------|
| Bank Accounts and CDs | Stocks and Bonds | Life Insurance Policies | Jewelry and Antiques |
| "Revocable" Burial Funds | Cars and Other Vehicles | Oil/Gas/Mineral Rights | Real Property/ Real Estate |

What Can be Excluded:

- " Homestead where the individual intends to return. (If Equity is not over \$560,000, unless there is a Spouse at Home).
- " Life Insurance if the face value is \$ 1,500 or less.
- " Separately identifiable burial funds of \$ 1,500 (less any excluded life insurance/"Irrevocable" Pre Need Funeral Plan).
- " One Car, of any value, if needed for medical transportation.
- " Burial spaces for the individual, spouse, and close relatives.

Protected Resources Amount for Community Spouse: 1/2 of Estate OR \$ 24,180 Min. up to \$ 120,900 Max.

(Excludes value of homestead, household goods, personal goods, one car, and burial funds)

APPLIED INCOME AND COPAYMENT INFORMATION

- " **Individual-** total gross income less \$ 60 for personal needs.
- " **Individual with a spouse in the community-** total gross couple income less \$ 60 for personal needs, Less \$ 3,022.50 for community spouse less certain amount for dependents living with community spouse.
- " **Couple -** Total gross income less \$ 120 for personal needs. Certain incurred medical expenses are deducted if the Medicaid program does not cover direct payment for the services.

For General Public Information only. You must contact your Attorney for legal advice.

Estate Preservation Network™ is a For-Profit Legal Services Contract Company regulated by the Texas Department of Licensing and Regulation, (800) 803-9202.

For a Free Consultation, contact Estate Preservation Network, LLC, 1464 East Whitestone Boulevard, Suite 504, Cedar Park, Texas,

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