

Medicaid E.A.S.Y. Referral Form



For Sales & Broker reference only

Prospect Information

Full Name	_____	Date of Birth	_____
Phone Number	_____	Preferred Language	_____
Residential Address	_____		
Marital Status	_____	Citizen / 5 yr. Resident?	_____
Individual Income \$	_____	Source(s) of Income	_____
Spouse Income \$	_____	Source(s) of Income	_____
Estimated Assets \$	_____		
Medicaid ID #	_____		
PCP Name	_____	Willing to change PCP?	_____
Contact person <i>(If different than prospect)</i>	_____	Phone	_____

List and describe below all medical and mental health conditions as well as anything that makes it hard to perform daily living activities such as bathing, eating, toileting, dressing, etc., even if you are not receiving treatment.

Referral Information

Referral name	_____	Referral date	_____
Organization	_____		
Notes:	_____		

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2023 Massachusetts MassHealth Income & Asset Information

MassHealth Coverage Types	Individual Income Limits	Married Income Limits	Individual Asset Limits	Married Asset Limits
65+ MH Standard	\$1235 (Includes \$20 disregard)	\$1684 (Includes \$20 disregard)	\$2000	\$3000
65+ MH Standard with PCA Supplement (needs assistance with 2 ADLS)	\$1616	\$2186	\$2000	\$3000
65 + MH Standard with Frail Elder Waiver	\$2742	n/a	\$2000 for waiver applicant	Waiver's spouse: \$137,400
MassHealth for 21-64	\$1616	\$2186	n/a	n/a

Please Note – For Massachusetts

- Senior MH Standard + PCA
 - Must need assistance with at least 2 activities of daily living to be eligible
 - Informal support counts (daughter, neighbor)
 - If member does not have formal or informal support MassHealth will still apply the PCA income disregard to their case
 - If senior has a dependent under the age of 19 their eligibility will be determined as an under 65 cases
- Assets
 - If member's home is owner-occupied, it is a non-countable asset up to a value of \$955,000.
- Income
 - Rental income is counted as income- see tax return Schedule E to verify if income is gain/loss.
- Frail Elder Waiver
 - 5 Year look back period does not apply when transferring assets from spouse to spouse
 - For Home and Community Based members, if member is in long-term-care or assisted living facility, they are not eligible for waiver.
- Cost to live at home must not exceed the cost to live in a Long-Term-Care Facility

2023 Rhode Island Medicaid Income & Asset Limits

Individual Income Limits	Married Income Limits	Individual Asset Limits	Married Asset Limits
\$1,235-\$1458	\$1,663-\$1972	\$9,090	\$13,630

Please Note – For Rhode Island

Must have Medicare Parts A & B as well as one of the following RI Medicaid plan names to be eligible to enroll in CCA Medicare Maximum (HMO D-SNP):

- | | |
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| <ul style="list-style-type: none"> • Categorically Needy Services • LTSS-HCBS Services • OHA Assisted Living • Habilitation Community Services • Habilitation Group Home Services • ICF/MR Respite Services • Independent Provider Program • Intellectual Disability Services (BHDDH) • Shared Living • Medicare Premium Payment (QMB) | <ul style="list-style-type: none"> • Intellectual Disability Services (Respite) • LTSS – Medically Needy (Home) • LTSS – Medically Needy (Institution) • Medicaid Preventive Services • Medically Needy Services • Personal Choice • Preventive Community Services • Assisted Living • Self-Directed Services |
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