**Medicaid E.A.S.Y. Referral Form**

For Sales & Broker reference only

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| **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  | Phone  |
| *(If different than prospect)* |  |
| 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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| **2024 Massachusetts MassHealth Income & Asset Information** |
| **MassHealth Coverage Types** | Individual Income Limits | Married Income Limits | Individual Asset Limits | Married Asset Limits |
| **65+ MH Standard** | $1255(Includes $20 disregard) | $1703(Includes $20 disregard) | $2000 | $3000 |
| **65+ MH Standard with PCA Supplement (needs assistance with 2 ADLS)** | $1670 | $2266 | $2000 | $3000 |
| **65 + MH Standard with Frail Elder Waiver** | $2829 | n/a | $2000 for waiver applicant | Waiver’s spouse:$154,140 |
| **MassHealth for 21-64** | $1670 | $2266 | 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
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