

Case Study - Eligibility: Spot the Issues

In pairs:

1. Read the Fact Pattern
2. Apply the Discovery Process
 - Spot the issues and write them down
 - Identify the questions you would post

Client: Mr. & Mrs. Smith

Name:	Age	Income (Social Security)
Mr. Smith	75	\$1,500 per month
Mrs. Smith	73	\$500 per month
Assets (All Joint)		
House		\$100,000
Stocks		\$102,540
Savings		\$120,000
Car		\$15,000
Life Insurance	Face Value	\$1,000
	CSV	\$3,900
Assumptions		
Personal Needs Allowance		\$75
Individual Resource Allowance		\$3,000
CSRA		\$99,540
MMMNA		\$2,489
Regional Divisor		\$5,000
Cost of Health Insurance:	Per month each	\$150
Cost of Care	Per month each	\$5,000
Interest on Savings		3%
No Dividends on Stocks		

Situation

- Mr. Smith has a stroke on January 15, 2009 and enters the hospital
- Mrs. Smith is healthy and comes to you on February 21, 2009 to tell you that Mr. Smith is being transferred to a nursing home on March 1, 2009.
- Mrs. Smith has been requested to complete a Medicaid application by the hospital social worker.

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Determine Eligibility

Eligibility Issues Noted

Questions to Ask Client