

# **CHANGE NOTICE FOR MANUAL NO. 19-10, TRANSFER OF ASSETS**

**DATE: NOVEMBER 1, 2010**

**Manual: Aged, Blind, and Disabled Medicaid**

**Change No: 19-10**

**To: County Directors of Social Services**

**Effective: November 1, 2010**

**Make the following change(s)**

## **I. BACKGROUND**

Transfer of assets change was implemented effective November 1, 2007, and transitional policy was put in the manual (MA-2241) for in home health services and supplies. The transition end date is November 1, 2010. The Transfer of Assets Evaluation Needed Report will continue at this time. We will advise you when the report is discontinued.

The Social Security Administration updated the life expectancy table for 2010. The figures in the life expectancy table are used to determine the life expectancy of a beneficiary of an annuity or a lender. The value of a life estate or a remainder, which is based on life expectancy of the life estate holder, continues to be determined from MA-2230, Figure 4, Life Estate/Remainder Interest Tables. The values in these tables have not changed.

## **II. CONTENT OF CHANGE**

MA-2240 - Transfer of asset evaluations and sanctions no longer apply to PLA in home health services and supplies.

MA-2240 - Figure 1 has been updated with the current life expectancies.

MA-2241 – As the transitional policy ended, this section has been deleted.

## **II. EFFECTIVE DATE AND IMPLEMENTATION**

This is effective with all applications taken on or after November 1, 2010.

#### **IV. MAINTENANCE OF MANUAL**

- A. Remove: MA-2240, Transfer of Assets, Figure 1.**  
**Insert: [MA-2240](#), Transfer of Assets, Figure1.**
- B. Remove: MA-2240, Transfer of Assets, pages 55-58.**  
**Insert: [MA-2240](#), Transfer of Assets, pages 55-56, effective 11/01/10.**
- C. Remove: MA-2241, Transition Policy For In-Home Health Services & Supplies.**

If you have any questions regarding this information, please contact your Medicaid Program Representative.

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Director

(This material was researched and written by John Benske and William Appel, Policy Consultants, Medicaid Eligibility Unit)