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**INSTITUTIONALIZATION**

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**SPOUSAL IMPOVERISHMENT**

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**C. ASSESSMENT  
OF RESOURCES  
VS.  
APPLICATION  
FOR MEDICAID**

When requested by either member of a couple (the IS or the CS) or by a representative acting on behalf of either the IS or CS, the Regional Office must complete an assessment of the couple's resources:

- An assessment is a "snap-shot" of the couple's total countable resources in the month of institutionalization, i.e., what was true in the month the IS entered an institution for 30-consecutive days or longer on or after 09/30/89. If one spouse has not yet entered an institution on the date the assessment is requested, an assessment cannot be provided.
- An assessment is separate from an application for Medicaid. If the IS wishes to apply for Medicaid, an "assessment" is not required. Resources will be evaluated under Spousal Impoverishment rules and the appropriate Medicaid notice used to approve or deny eligibility. However, if the couple only wants to know how Medicaid would evaluate their total resources if application were filed, an assessment is required.
- An assessment provides a written evaluation of resources to the couple giving the following information:
  - the total value of countable resources;
  - the basis for the determination;
  - the CS share based on the maximum standard allowed as of the month of the assessment;
  - whether the IS would be currently resource eligible if application were to be filed

A "Resource Assessment Notice" will be used to document the information specified above.