

469-000-338 SIMP PROCEDURE FOR AD WAIVER AT HOME

**Both the couple are either aged or disabled (both categorically eligible):**

- A. **One spouse has already met the 30 day facility care rule (Assessment of Resources) and is now applying for AD Waiver @ home for one.**
1. Current resources must be no more than the IM-73 reserved amount + \$4,000.
  2. Complete the IM-74 and begin spousal (SIMP) budgeting with the month that AD Waiver services actually begin.
  3. Do not open the Medicaid SIMP case and use SIMP until you know what month Waiver is activated. Waiver and Medicaid need to coordinate this.
- B. **Neither spouse has met the 30 day facility care rule and is now applying for AD Waiver @ home for one.**
1. Resources must be no more than \$6,000 for the eligible couple.
  2. Make the AD Waiver referral. Provide waiver with a "test budget" with the couple budgeted separately so the Waiver knows what the SOC, if any, will be if they approve waiver for one.
  3. Open the Medicaid case with the appropriate FPL or SOC **together**.
  4. When/if AD Waiver notifies they are beginning waiver services, then do a recalculated budget and budget the couple **separately** for the month waiver begins for one.
  5. If the non-waiver spouse does not need or want Medicaid, then close that spouse for the come-up month and use SIMP budgeting because the 30-day rule has now been met. (If less than 10 days, have the spouse waive 10-day notice.)

**Only one of the couple is aged or disabled (categorically eligible):**

- A. **One spouse has met the 30 day facility care rule and is now applying for AD Waiver @ home for one:**  
Follow all the steps 1 through 3 in A above.
- B. **Neither spouse has met the 30-day facility care rule, and one is now applying for AD Waiver @ home.**
1. Resources must be no more than \$6,000 for the couple residing together in the home.
  2. Make the AD Waiver referral and provide waiver with a test "together" budget. This means with both spouses' income, and may be a SOC.
  3. Open the Medicaid case for the eligible spouse (participant) and include the ineligible spouse's income. If there is a SOC, set the case to spend down status.
  4. At the end of the 30 day period of receipt of AD @ home Waiver:
    - a. Complete the Assessment and the Designation of Resources (IM-73 and IM-74);
    - b. Recalculate the budgets using SIMP budgeting, beginning with the month in which @ home Waiver services began, and forward.

**TIPS:**

1. You can never use SIMP budgeting for any month that the non-waiver spouse was a participant/eligible on the system. This includes in spend down status with a SOC form.
2. A disabled or aged spouse cannot choose to be ineligible until one spouse has met the 30-day requirement for Spousal (either facility or @ home waiver).
3. Setting a Waiver client to active status means you have obligated any SOC to the waiver services billing.