



## **Policy Directive 2020-09-04**

### **Title: Implementation of ES-3104.7 Income Allocation Worksheet**

**Date: September 25, 2020**

**From: Erin Kelley, Senior Manager Policy**

**Program(s) impacted: Elderly and Disabled Medical Programs**

The purpose of this document is to advise of the creation of form ES-3104.7 (Income Allocation Worksheet) and provide guidance to staff on the use of this new form. Revisions to the Medical KEESM will follow the implementation of this directive.

#### **A. Background**

When an individual receiving long term care in an institutional living arrangement has a minor child who does not reside with the community spouse (or where a community spouse does not exist), the option for an income allocation still remains; however, there are additional standards that must be taken into consideration prior to determining the amount of income subject to allocation. Previously, form ES-3104.5 (Determination of Need) was used for this purpose. Complications with determining the allocation that would be allowed for a minor child has been observed when using this form in these instances.

#### **B. Policy**

Effective with the implementation of this directive, a new form, the ES-3104.7 (Income Allocation Worksheet), has been created as a tool to simplify the calculations needed to determine the income allocation for a minor child not living with a community spouse. This form may be utilized by staff where appropriate; however, it shall not be considered a policy requirement. This form does not replace the ES-3104.5 nor the ES-3163 (Income Allowance Determination Form) and shall only be used following the provisions outlined in Medical KEESM 8143(4) and 8243(3). Instructions to aid staff in the completion of the form have been provided on the ES-3104.7.

**For questions or concerns related to this document, please contact one of the KDHE Medical Policy Staff below.**

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