



Policy Directive 2022-09-01

Title: Implementation of ES-3172 Life Insurance Information Request Form

Date: September 02, 2022

From: Erin Kelley, Senior Manager

Program(s) impacted: E&D Medical Programs

The purpose of this document is to advise of the creation of form ES-3172, Life Insurance Information Request, 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 applying for any E&D and/or LTC Medicaid Program reports ownership of a life insurance policy (either whole life or term life), verification of that policy must be reviewed to determine if the life insurance policy is countable or exempt. Previously, this information has been requested using verbiage from the KDHE Standard Copy & Paste (SCP) spreadsheet and inserting the snippet into a verification notice.

B. Policy

Effective with the implementation of this directive, a new form, the ES-3172 Life Insurance Information Request Form, has been created as a tool to simplify the process of requesting all required information to determine if a life insurance policy is countable or exempt, and to determine the value of the policy. This form may be utilized by staff where appropriate; however, it shall not be considered a policy requirement. This form does not replace the requirement to formally request the life insurance policy information using the SCP verbiage in a verification notice. A separate verification snippet has been added to the SCP for when staff send the ES-3172 form. Instructions to aid consumers and the life insurance companies in the completion of the form have been provided on the ES-3172.

For questions or concerns related to this document, please contact the KDHE Medical Policy Staff at KDHE.MedicaidEligibilityPolicy@ks.gov.

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Questions regarding any KEES issues are directed to the KEES Help Desk at KEES.HelpDesk@ks.gov.