

Exercise Information – Lee (DoA)



Class	Description
Module(s)	AG08 LTC – Open a LTC Case on Your Own
HOH Name	Lee
Programs Requested	Medical
Scenario from Instructor Guide	Lee mailed in his application and is applying for DoA Medical assistance. He receives RSDI, has a mutual fund that he is transferring to his daughter and wants to divert the maximum of his income. Lee lives with his wife; she is not applying for benefits and receives a monthly pension.
Assumptions	No felony convictions, not a veteran, is not a migrant farmworkers

Question	Answer
Application Information	Received a paper application; requesting Medical and three prior months coverage
Programs Requested	Medical; Interview not required
Head of Household	Lee-Male; Date of Birth 02/20/1944; Non-Hispanic; Asian; Speaks English SSN: 623-20-XXXX Social Security Claim Number: 623-20-XXXX A Verifications: Legal Birth Certificate; Verified by SSA Married; US Citizen; IL Resident Verifications: IL SoS Clearance; Federal Data Hub Verified by SSA; Relationship: Marriage Certificate
Address	1301 W. Fullerton Avenue Apartment 34 Chicago, IL 60614; Cook County
Other Household Members	Kim- Wife; Female: Date of Birth 01/15/1945; Married; Non-Hispanic; Asian; Speaks English SSN: 624-20-XXXX Verifications: Legal Birth Certificate, Verified by SSA Married; US Citizen; IL Resident Verifications: IL SoS Clearance; Federal Data Hub Verified by SSA; Relationship: Marriage Certificate
Aged/Disability Benefits	CSCD: 3/15/2012 Benefit Type: RSDI Retirement Benefit Application Date: 1/1/2012 Benefit Begin Date: 3/15/2012 Claim Number: Drop down menu

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Question	Answer
	Verification: SOLQWTPY
Special Medicaid Approval	Home and Community Based Services (DoA) CSCD: 07/15/2013 Approval Begin Date: 07/15/2013
Unearned Income	<p>Lee - \$1350.00 RSDI, paid monthly on the 3rd Application date: 11/01/2010 Benefit begin date: 01/15/2011 Verification: Recent check stub(s)</p> <p>-----</p> <p>Kim - \$950.00 Pension, paid monthly on the 1st Pension start date: 01/01/2013 Verification: Recent check stub(s)</p>
Diversion Income	Diverting the maximum amount of his income to his daughter
Diversion Assets	Community Spouse Resource Allowance (maximum)
Shelter Expenses	None
Case Comments	<Insert any case comment text>
Assets Module 9: Assets	Mutual Fund \$125,000; transferring to his wife, Kim CSCD: 1 st of the month 3 months prior to application/reported on date Verification: Current statement from Financial Institution, Transfer Documents
Medical Expenses Module 10: Spenddown	Incurred a one-time medical expense \$12,000, the customer is liable for \$12,000 Date of Service: 11/01/2013 Date Billed/Paid: 11/01/2013 Verification: Medical Bill or Receipt Last month to allow expense: one year from today