
MEDICAID ELIGIBILITY
FORMS AND INSTRUCTIONS

D0M-321A - BURIAL ASSETS EXCLUSION WORKSHEET

PURPOSE & USE

This form is used to document each case record which involves application of the burial asset exclusion with the amount to be excluded and the amount in excess of the exclusion limit which must be counted as a resource, if any. A separate worksheet is required for an eligible individual with an ineligible or eligible spouse since each member of a couple is entitled to a separate computation.

INSTRUCTIONS

Prepare an original only to be filed in each case record affected by the exclusion. Refer to Section F, Resources, for policy governing funds set aside for burial.

Complete this form only for those individuals who would be ineligible due to excess resources if the burial assets exclusion were not applied. Follow the instructions for the amount to enter in each step as outlined on the form. The end result will designate the amount to be excluded as a resource.

The worker will sign and date the form.

CASE NAME: _____

MEDICAID ID #: _____

BURIAL ASSETS EXCLUSION WORKSHEET

Name _____ Effective Month: _____

Person Named Above Is: Eligible Individual Eligible Spouse Ineligible Spouse

1. Does client meet the resource limit without applying the burial assets exclusion?

Yes No If YES, STOP. If NO, CONTINUE:

2. Determine net burial assets exclusion limit:

A. _____ Maximum Burial Assets Exclusion Limit (Use \$3000 or \$1500, whichever is applicable)

B. - _____ Offset (Subtract total value of all irrevocable burial arrangements and/or the total face values of life insurance policies owned by the individual or spouse on his/her life PROVIDED cash surrender value was excluded in determining countable resources.)

C. \$ _____ Net Burial Assets Exclusion Limit

3. Determine excluded and countable burial assets:

A. \$ _____ Combined Value of Burial Assets (Revocable burial contracts, revocable trusts, or other designated assets ... e.g., bank accounts, etc.)

B. \$ _____ Net Burial Exclusion Limit (2. C.)

C. \$ _____ Excluded Burial Assets

-- If 3.A. equals or exceeds 3.B., then 3.B. is the amount of excluded burial assets.

-- If 3.A. is less than 3.B., then 3.A. is the amount of excluded burial assets.

D. \$ _____ Countable Burial Assets

-- If 3.A. exceeds 3.B. --- 3.D. is the difference between 3.A. and 3.B. (Include this amount on DOM-321)

-- If 3.B. exceeds 3.A. --- 3.D. is -0-