

Connecting Seniors to Coverage Referral Form

For sales and broker reference only

Prospect Information

Name	Date of b	birth	
Phone number	Language		
Street address	City	State ZIP	
Marital status Single Married Monthly income amount Assets below \$2,000 (single) /\$3,000 (married) Masshealth ID number	Citizen/5-year resident? Yes No If permanent resident for I Yes No Source(s) of income	ess than 5 years, do you need PCA services?	
PCP Name		Willing to change PCP?	
Contact person (if different from prosp	Phone number of contact person		
Brief medical summary			
Referral Information			
Referral name	Referral date	Referral phone number	
Organization		Note	



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a Point32Health company

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MassHealth Types	Individual Income Limits 2024	Married Income Limits 2024	Individual Asset Limits 2024	Married Asset Limits 2024
MH Standard 65+	\$1,255	\$1,703	\$2,000	\$3,000
MH Standard with PCA Supplement 65+	\$1,669	\$2,265	\$2,000	\$3,000
MH Standard with Frail Elder Waiver 65+	\$2,829	\$2,829 for each spouse applying	\$2,000 for each spouse applying	\$154,140 for spouse not applying in 2024

Important Information to Note:

To be eligible to MassHealth Standard through the PCA supplement, you must meet the financial criteria above, as well as:

- Have/need assistance with at least two Activities of Daily Living (see ADL examples below)
- Informal support, such as support from a family member or friend, qualifies as a Personal Care Attendant

To be eligible for MassHealth Standard through the Frail Elder Waiver, you must meet the financial criteria above, as well as:

• Undergo evaluation from Aging Service Access Point (ASAP), and need/accept assistance with minimum of two Activities of Daily Living

Examples of Countable Assets:

- Bank accounts & Cash
- Certificates of deposit, Mutual funds, Stocks and bonds, Individual Retirement Accounts, Keogh Plans
- A member's home if owner-occupied, is considered exempt up to a value of \$1,033,000
- Cash surrender value of life insurance
- Vehicles—One vehicle per household is non-countable
- Revocable Trusts (regulations regarding trusts are complex)
- Retroactive Supplemental Security Income (SSI) and Retirement, Survivors and Disability Insurance

Examples of Activities of Daily Living (ADLs):

- Get into/out of bed or chair
- Toilet hygiene
- Bathing or showering

- Getting dressed
- Personal hygiene
- Eating
- Walking and/or climbing stairs
- Safety/emergency responses

Potential Identifiers for Personal Care Attendant or Frail Elder Waiver

- Insulin Dependent or dialysis
- Oxygen dependent
- Alzheimer/Dementia
- Stroke
- Recent discharge from hospital/rehab
- Use of walker, cane, or wheelchair
- Chronic/terminal illness
- Currently receiving services from ASAP or VNA services (PT, OT, Med mgmt.)