



NEWSLETTER MAY 2002

We are Montgomery & Associates—a firm of ALTCS Planning Consultants. We are former State of Arizona ALTCS employees with experience in both determining eligibility for the long term care program and representing residents for the ALTCS application and qualification processes.

ALTCS is the State of Arizona’s version of Medicaid and it helps pay a resident’s medical expenses (nursing home bills, alternative residential setting, doctor’s bills, prescriptions, and home-and-community based services). However, a resident must apply for this program and qualify under the guidelines set forth in the ALTCS Eligibility Policy and Procedures Manual (over 1000 pages of policy and procedures!). Talk about bureaucratic red tape!

This is where we can help.

We untangle the red tape, iron out the wrinkles, guide the resident in the eligibility process, and represent them through the web of qualification. In the process of qualifying for help, we help protect their assets from probate and help them preserve their hard-earned money.



“Now which way do I go?”

ALTCS Non-financial Guidelines

- **Categorical Element**—*Is the resident over 65, Disabled, Blind, Under 18, Pregnant, or Deprived?*
- **Social Security Number**—*The resident must have proof of his/her SSN.*
- **Citizenship or Alien Status**—*Is the resident a US Citizen or a qualified alien?*
- **Arizona residency**—*Is the resident intending to stay in the state of Arizona?*
- **Marital Status**—*If the resident is married, he/she may be able to retain more of their combined assets.*
- **Living arrangement**—*Where does the resident reside? Is it an ALTCS approved setting? Will he/she have to move?*
- **Applying for potential benefits**—*Is the resident a Veteran or a widow of a Veteran? Did he/she work for a company with a pension plan?*
- **Third-party liability**—*Does the resident have other health insurance or benefits to help pay for the medical expenses? If yes, those must be assigned to AHCCCS.*
- **Medical assessment**—*Is the resident at risk of institutionalization? Does he/she require assistance with activities of daily living?*

ALTCS Financial Guidelines

- **Resources**—
***For single individuals:** Does he/she have less than \$2000 in assets?*
***For couples:** Do they have less than \$19856.00 in combined assets?*
- **Income**—
***For single individuals:** When you add together the Social Security and all other monthly pensions, is it less than \$1635.00?*
***For couples:** When you add together both Social Security pensions and all other pensions they receive each month, is it less than \$3270.00?*

Transfers—*Has the resident given away money or assets that he/she could have used to help pay for his/her care?*

Coming in next month’s newsletter: “What happens after ALTCS approval?”

SPEAKING SCHEDULE

- May 29—Creative Networks
 - June 2—Mariposa Gardens
 - June 12—The Beatitudes Nurse Ministry
- Want to learn more about ALTCS & its requirements? Call 480/464.4968 and have Carol Aragon-Montgomery speak to staff or residents at your next meeting.

CAN YOUR RESIDENTS QUALIFY FOR ALTCS?

The answer is “YES!” Even if your resident is over the income or resource limits set by ALTCS, we can help them qualify.

We have experience obtaining ALTCS eligibility for residents whose assets range from \$2000 to \$300,000.

Encourage all residents to see us before applying for the ALTCS program. Our initial evaluation is free and our fees are based on a sliding fee schedule.