

Spousal Allocation Agreement

Nursing Home Claimant

Social Security #

Nursing Home

Spouse of Claimant

Social Security #

Home Address

The Rights and Responsibilities of Spousal Allocation have been fully explained to the Claimant/Authorized Representative and I wish to make the following declaration:

Signature of Claimant,
Community Spouse or
Representative

Date

I do not wish to participate
in Spousal Allocation.

Signature of Claimant or
Authorized Representative

Date

I wish to allocate a portion
of my income to my
Community Spouse.

1. All income received by the Community Spouse has been reported to the Alabama Medicaid Agency.
2. Information provided is subject to verification and I authorize sources to release to the Medicaid Agency, information to verify statements.
3. Changes to information provided in this statement must be reported within 10 days and could affect eligibility.
4. Failure to report any changes could result in a penalty whereby I may be subject to recoupment action.
5. I affirm that all information provided to support the allocated amount is true.

Signature of Community
Spouse/Authorized
Representative

Date

I wish to receive an
allocation from my
spouse.

The Medicare Catastrophic Coverage Act of 1988 contains rules for the treatment of income and resources for couples where one spouse is institutionalized (in a nursing home) and one spouse lives in the community. In order to determine how much the nursing home patient must contribute to his cost of care in the nursing home and to determine an amount (if any) that is to be allocated to the spouse at home, we must have verification of the community spouse's income. There must be an agreement between the spouses (or someone acting in their behalf) to allocate income to and to accept the allocation.

Section 2651 of the Deficit Reduction Act of 1984 requires the Alabama Medicaid Agency to verify income and resources of claimants with other state and federal agencies. A condition of Medicaid eligibility is verification of Social Security Number(s). Social Security Numbers are also used in computer matching with the Social Security Administration, the Internal Revenue Service, and the Department of Industrial Relations.

The Alabama Medicaid Agency is authorized to collect the verification and information required to determine income and assets under Section 1924 of the Social Security Act. While it is not mandatory for you to furnish information and verification requested, failure to do so (or failure to provide all or part of the verification and information) will prevent the Alabama Medicaid Agency making a determination of allocation to the community spouse and/or dependent family members.