

INSTRUCTIONS

DHS 8004 (Rev. 06/17)

ANNUAL HOME EQUITY SURVEY FOR LONG-TERM CARE APPLICANTS/BENEFICIARIES

PURPOSE:

The DHS 8004, "Annual Home Equity Survey for Long-Term Care Applicants/Beneficiaries" form shall be completed by all Applicants/Beneficiaries with an equity interest in a home property receiving long-term care (LTC) services in a nursing facility, medical facility, or under home and community based services at the time of their annual renewal. This survey will ensure that the Department complies with federal regulations to terminate the eligibility of beneficiaries receiving long-term care services whose home equity interest exceeds the maximum home equity limit without a qualified family member(s) residing on the home property. (Community spouse, individual's child under age 21, or individual's child who meets the eligibility requirements of a blind or disabled individual per Hawaii Administrative Rules §§17-1719-10(a)(2) or 17-1719-10(a)(3)).

Eligibility staff shall use the information on this form, along with all supporting documents submitted by the beneficiary or information from the real property tax website to determine continued eligibility for LTC confirming either exemption from this provision as a qualified family member(s) continues to reside in the home; the home equity interest does not exceed the maximum allowed; or a legal encumbrance (mortgage or lien placed by the Department) on the home property.

GENERAL INSTRUCTIONS:

1. The EW shall complete the FOR OFFICIAL USE ONLY block of this form with the Applicants/Beneficiary's name, Case No., and Date DHS 8004 Mailed at the time of the annual renewal for LTC beneficiaries with a home equity interest.
2. The LTC beneficiary shall complete the form, attach applicable documents and return by the due date determined by the EW.
3. Upon receipt, the EW shall date-stamped the form and attachments and enter the Date DHS 8004 received in the FOR OFFICIAL USE ONLY block of this form.
4. The EW shall review the form and documents provided to determine continued eligibility for LTC services confirming:
 - a. If a community spouse, minor child or blind or disabled child resides on the property; and/or
 - b. The beneficiary's equity interest does not exceed the current maximum home equity limit (subtract legal encumbrances).
5. The EW shall complete the annual eligibility renewal:
 - a. If eligible for LTC and medical assistance, send appropriate ER completion notice;
 - b. If eligible for medical assistance but ineligible for LTC, send appropriate eligibility for and hardship waiver request notices; or
 - c. If ineligible for medical assistance and ineligible for LTC, send appropriate termination notice.

FILING/DISTRIBUTION INSTRUCTIONS:

The EW shall file the original copies of the DHS 8004 form with supporting documents in the case record and document action in KOLEA.