

# A Guide to Establishing Starting Point/Lookback

## Institutionalization Definitions

**Institutionalized for Transfer of Assets:** Individual receives institutional services (Nursing facility/ICF-MR/swing bed/inappropriate level of care) or services provided through a Program of All-Inclusive Care for the Elderly (PACE) or through the Community Alternatives Program (CAP).

**Institutionalized – Long Term Care Budgeting/Community Spouse Resource Allowance and Continuous Period of Institutionalization:** This is 30 consecutive days in a medical facility or combination of medical facilities. The facilities are nursing facility, intermediate care facility-mental retardation (ICF-MR), swing bed, inappropriate level of care in a hospital, or hospital acute level, and psychiatric residential treatment facility (PRTF).

**Institutional Living Arrangement:** Institution or establishment that provides food, shelter and some treatment to 4 or more persons who are not related to the owner. This includes nursing facilities, group homes, orphanages, adult care homes, residential treatment facilities.

## Lookback Date

I. **Starting point:** The **earliest date that** both the following conditions are met:

1. The **a/b** is institutionalized (refer to MA-2240, Transfer of Assets, for definition) or requests CAP or PACE, **and**
2. Applies for or receives Medicaid

**NOTE:** If lookback date has already been established, it does not change. (refer to MA-2240, Transfer of Assets)

II. **Lookback date:** The look back date is 5 years (60 months) prior to the starting point.

### Establishing Lookback Date

Has the A/B ever resided in a nursing facility? Yes  No  Date \_\_\_\_\_

If **yes**, did the A/B apply for/receive Medicaid? Yes  No  Date \_\_\_\_\_

**Or**

Has the A/B ever been placed on a CAP waiting list? Yes  No  Date \_\_\_\_\_

Has the A/B ever requested PACE?? Yes  No  Date \_\_\_\_\_

If **yes**, did the A/B apply for/receive Medicaid? Yes  No  Date \_\_\_\_\_

The starting point is the **first date** that **both conditions** are met. **Starting Point** \_\_\_\_\_

**Lookback date** \_\_\_\_\_