A Guide To Establish Starting Point/Lookback

Case Name ________________________________ Individual ID# _____________________________

Has lookback period been previously determined?

No Continue to next section. If Yes STOP. Enter dates here.

Lookback date for most transfers: __________ Lookback date for transfers to trust/annuities: __________
(Note: Once lookback date/period established, it will never change.)

Check EIS history on individual (name search, social security number, application history)

When was A/R’s first Medicaid application in any program category? __________

If the first Medicaid application was: Prior to 2/1/03 or on or after November 1, 2007, go to Step 1.
2/1/03 through October 31, 2007, go to Step 2.

* * * STEP 1 * * *

Has the A/R ever resided in a nursing facility? Yes ☐ No ☐ Date __________

If yes, did the A/R apply for/receive Medicaid? Yes ☐ No ☐ Date __________

Or

Has the A/R ever been placed on a CAP waiting list? Yes ☐ No ☐ Date __________

If yes, did the A/R apply for/receive Medicaid? Yes ☐ No ☐ Date __________

The starting point is the first date that both conditions are met. Starting Point = __________

Lookback date for most transfers __________

Lookback date for transfers to trusts & annuities __________

* * * STEP 2 * * *

First Medicaid application dated after 2/1/03 and before November 1, 2007.

The starting point for determining the lookback date for individuals whose first application for Medicaid is on or after 2/1/03 is the date of application.

Starting Point (Date of application) __________

Lookback date for most transfers __________

Lookback date for transfers to trusts & annuities __________

Worker Signature __________________________ Date Completed ______________________