South Carolina Department of Health and Human Services
RESOURCE ASSESSMENT WORKSHEET

Name of Institutionalized Individual: _____

Social Security Number of Institutionalized Individual: _____

Date of Admission to Facility: _____

Name of Community Spouse: _____

Social Security Number of Community Spouse: _____

I. COUNTABLE RESOURCE COMPUTATION

Resource	Institutionalized Individual Value	+	Community Spouse Value	-	Excluded Resources Value	=	Countable Value
Automobile, truck, etc.							
Life insurance							
Cash on hand							
Checking account(s)							
Savings account(s)							
U. S. Savings Bonds							
Stocks and bonds							
Trust fund							
Preneed burial contract							
Burial space items							
Lifetime rights/estate property							
Personal property							
Patient funds							
Real property							
Other (specify)							
Other (specify)							

Countable Resources Subtotal	$_____	$_____	$_____	$_____
Less: Burial Assets Exclusion (From section II)	$_____	$_____	$_____	$_____
Total Countable Resources	$_____	$_____	$_____	$_____

Signature of Medicaid Eligibility Worker: _____

Decision Date: _____ Effective Date of Assessment: _____

II. BURIAL ASSETS EXCLUSION COMPUTATION

A. Determine Net Burial Assets Exclusion Limit:

	Institutionalized Individual	Community Spouse
1. Maximum Burial Assets Exclusion Limit	$	$
2. Offset (Subtract the value of irrevocable burial arrangements.)	$	$
3. Net Burial Assets Exclusion Limit (A 1 – A2 = A3)	$	$

B. Determine Excluded and Countable Burial Assets:

	Institutionalized Individual	Community Spouse
1. Combined Value of Burial Assets (Revocable burial contracts, revocable trusts, or other designated assets, e.g., bank accounts, etc.)	$	$
2. Net Burial Assets Exclusion Limit (A3)	$	$
3. Excluded Burial Assets (If B1 equals or exceeds B2, B2 is the amount of excluded burial assets. If B1 is less than B2, B1 is the amount of excluded burial assets.)	$	$