

## 2316 – HOMEPLACE: ABD MEDICAID

<b>POLICY STATEMENT</b>	A non-institutionalized A/R's homeplace, regardless of value, is excluded from resources in its entirety. An institutionalized A/R's homeplace is a countable resource, but the value will be considered exempt as long as the A/R remains institutionalized and retains ownership interests.
<b>BASIC CONSIDERATIONS</b>	<p>The homeplace is property in which the A/R or a deemor has an ownership interest and that serves as the principal place of residence of the A/R, the A/R's spouse or other dependent relative.</p> <p>The homeplace consists of the following:</p> <ul style="list-style-type: none"> <li>the shelter in which the A/R lives</li> <li>the land on which the shelter is located (home plot)</li> <li>all land which adjoins the home plot if the adjoining land is not completely separated from the home plot by land in which neither the A/R nor a deemor has an ownership interest.</li> </ul> <p><b>NOTE:</b> Easements and public rights of way do <i>not</i> separate the property of the homeplace.</p> <ul style="list-style-type: none"> <li>all other buildings located on the homeplace property.</li> </ul>
<b>Absence for A/R's in LA-A, B, or C</b>	When an A/R is absent from home, the property may continue to be excluded from resources as a homeplace under certain conditions.
<b>Georgia Homeplace</b>	<p>If the absent A/R's home is located in Georgia, the homeplace will continue to be excluded from resources if any one of the following conditions is met:</p> <ul style="list-style-type: none"> <li>The A/R or PR states in writing that the A/R plans to reoccupy the homeplace.</li> <li>The A/R's spouse or dependent relative continues to live in the homeplace while the A/R is absent.</li> <li>Sale of the homeplace would cause undue hardship to the owner of the homeplace because of loss of housing.</li> </ul>



**BASIC  
CONSIDERATIONS  
(cont.)****Absence from Out  
of State Homeplace**

An out-of-state homeplace may be excluded from resources during the A/R's absence only if the A/R's spouse or dependent relative lives on the homeplace.

**Absence from  
Homeplace for  
A/R's in LA-D**

The homeplace of an A/R residing in LA-D is a countable resource effective the first full month that the A/R resides in LA-D. The value of the homeplace will be exempt, and will not be counted in the resource determination, as long as the A/R remains in LA-D and retains ownership interest.

**NOTE:** SSA does not consider a *vacant* homeplace to be an excluded resource for purposes of determining SSI eligibility. A vacant homeplace may be excluded as a resource for an ABD Medicaid A/R only if the A/R resides in LA-D, or a dependent relative resides in the homeplace.

A dependent relative can be a spouse, son, daughter, grandson, granddaughter, stepson, stepdaughter, in-laws, mother, father, stepmother, stepfather, grandmother, grandfather, aunt, uncle, sister, brother, stepsister, stepbrother, half-sister, half-brother, niece, nephew or cousin.

Dependency may be found where the relative alleges *any* reasonable degree of reliance on the A/R's homeplace. Reasonable factors of dependency are age, medical reasons, financial circumstances, etc. The degree of dependency is not material. It is not necessary to assign a dollar limitation for determining whether financial dependency exists.

**PROCEDURES**

Verify and document the A/R's ownership interest in homeplace property. Refer to Section 2060, ABD Medicaid Application Processing, for guidelines on completing a property search.

Place copies of any legal documents obtained via the property search or in the possession of the A/R in the case record.

**Absence for  
LA-A, B or C**

If an A/R residing in LA-A, B, or C intends to return to a homeplace, obtain the A/R's or PR's *written* statement for the case record.

If the spouse or dependent relative lives in a Georgia or out-of-state homeplace, document the A/R's or PR's statement. If questionable, develop further by verifying with a home visit, collateral contact, etc.

Accept and document the A/R's or PR's statement as to the degree of relationship and dependency unless questionable.

**Absence  
for LA-D**

Document ownership and the value of the homeplace. Do not count the value of the homeplace in the resource determination as long as the A/R remains in LA-D and retains ownership of the homeplace.

**SPECIAL  
CONSIDERATIONS****Transfer of the  
Homeplace**

Effective with OBRA '93, the homeplace is a countable resource for A/Rs in LA-D, even though the value is not considered in the resource determination. For any homeplace transferred on or after 8-11-93 (OBRA '93), presume that the transfer was made for the A/R to continue to qualify for Medicaid under OBRA '93, unless the A/R transferred the homeplace exclusively for a reason other than to qualify for Medicaid. Refer to Section 2342, Transfer of Resources.