



**Commonwealth of Massachusetts**  
**Executive Office of Health and Human Services**  
**Office of Medicaid**  
600 Washington Street  
Boston, MA 02111  
[www.mass.gov/masshealth](http://www.mass.gov/masshealth)



**MassHealth**  
**Long Term Care Facility Bulletin 89**  
**July 2005**

**TO:** Nursing Facilities, Acute Inpatient Hospitals, and Community Health Centers  
Participating in MassHealth *BW*

**FROM:** Beth Waldman, Medicaid Director

**RE:** **Senior Medical Benefit Request (SMBR)**

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**Background**

As of July 18, 2005, eligibility determinations for community persons aged 65 years or older and persons of any age needing long-term-care services at home will be processed through the MassHealth MA21 eligibility system, instead of through PACES.

To support this initiative, MassHealth has developed a new application for the "traditional" population called the Senior Medical Benefit Request (SMBR). Although most of the information collected on the SMBR is similar to that gathered on the current MassHealth Application (MHA), the SMBR has been formatted to be used as a data entry document on MA21 using "traditional" eligibility rules. The SMBR will replace the MHA, which will become obsolete as of September 5, 2005.

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**SMBR Use**

The SMBR will be used for the following populations.

- Persons who are aged 65 or older and living at home.
  - Persons who are eligible for MassHealth under certain programs (i.e., Kaileigh Mulligan, PACE, and Spousal Waivers) to get long-term-care services to live at home.
  - A person who is a member of a married couple living with his or her spouse; **and**
    - both members of the couple are applying for MassHealth; **and**
    - there are no children under 19 years of age living in the household; **and**
    - one spouse is 65 years of age or older and the other spouse is under 65 years of age.
  - Persons of any age needing long-term-care services in a medical institution.
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**SMBR Use**  
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Note: The procedures explained in this bulletin do not affect the following persons.

- Persons who are applying for MassHealth Buy-In for Qualifying Individuals. These persons will continue to complete the MassHealth Buy-In application (MHBI-1).
- Persons aged 65 or older who are disabled and working at least 40 hours per month. These persons will continue to complete the Medical Benefit Request (MBR) for processing through the Central Processing Unit.

Although the new SMBR will also be used for persons needing long-term-care services in a medical institution, eligibility determinations for this population will continue to be processed through PACES as it is currently. At a later date, eligibility determinations for this population will be transferred to the MA21 eligibility system.

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**SMBR Changes**

The SMBR (orange form) contains the following changes.

- The instruction page has been rewritten to assist applicants with choosing the SMBR or MBR, whichever is appropriate for them.
- The SMBR is now used to determine eligibility for the Uncompensated Care Pool as well as MassHealth.
- The "Personal-Care-Attendant Services" section now has a lead question that if answered "no" will take the applicant to the next section (Income from Working).
- The "Nonworking Income" section resembles more closely the same section on the MBR to capture needed information for an accurate determination on MA21.
- The "Assets" section has been changed to match more closely the MA21 eligibility data entry screens that have been designed for all asset types.
- A new section has been added to capture information about long-term unemployment, disability, and HIV eligibility using Health Care Reform (HCR) rules when a spouse under the age of 65 is in the household.
- The signature page now includes references to the Uncompensated Care Pool.
- The blue Long-Term-Care Supplement (LTC-SUPP) has been incorporated into the SMBR as a blue supplement: Supplement A: Long-Term-Care Questions.

Note: The stand-alone LTC-SUPP will continue to be used in situations when a member is "transitioning" from a HCR community-based situation to a long-term-care medical institution.

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**SMBR Changes**  
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- The gold PCA Supplement and Form 4506 (IRS form to request previous tax returns) will continue to be stand-alone forms included in the application packet.
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**Supplies and Use of New and Old Forms**

Supplies of the SMBR will be available on July 1, 2005. To order supplies, call: **1-800-841-2900** or e-mail to: **publications@mahealth.net**.

After September 5, 2005, the red MHAs will no longer be accepted at the MassHealth Enrollment Centers (MECs). If an MHA is received after September 5, 2005, applicants will be mailed the new SMBR along with their obsolete date-stamped MHA, and an Application Return Notice (MHA-RET (09/05)). To protect their previously received MHA application date, the applicant will be given 14 days from the date of the MHA-RET notice to return the completed SMBR. If the SMBR is submitted to the MEC after 14 days of the date on the MHA-RET, the date the SMBR is returned to the MEC will be the SMBR application date.

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**MassHealth and You Guide**

The MassHealth and You Guide has been revised to reflect the SMBR changes and has five sections with a new section IV (Senior Care Options and Other Benefits) added. The revised Guide will be effective July 1, 2005, and will be packaged with the new SMBRs. It will also be available as a stand-alone publication.

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