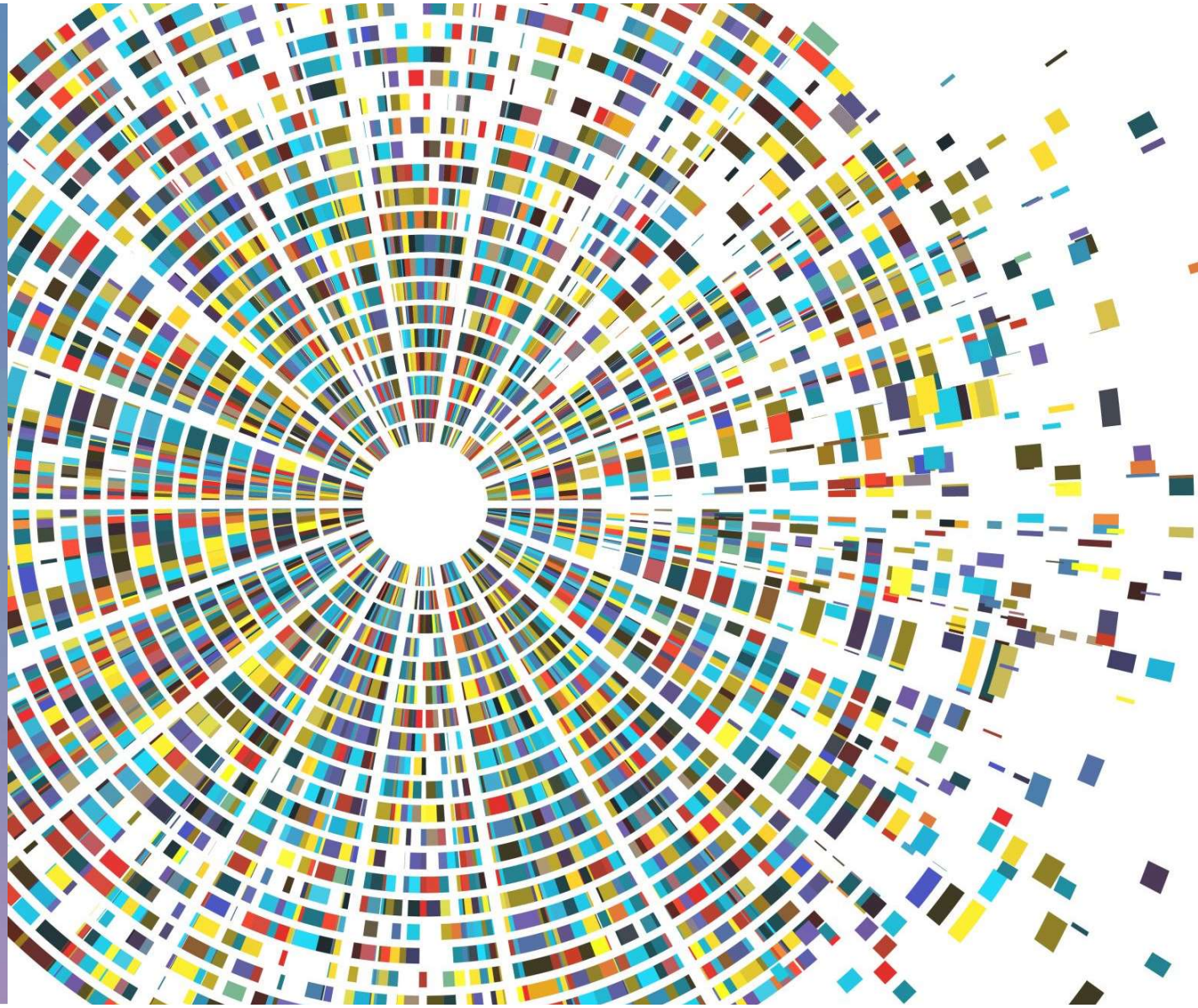
CANDACE KELLY

SHELLEY HENLEY

CULTIVATING AG KNOWLEDGE



WHAT ARE AUXILIARY GRANTS?

- The **Auxiliary Grant (AG)** is an income supplement for individuals who receive Supplemental Security Income (SSI) and certain other aged, blind, or disabled individuals who reside in a licensed assisted living facility (ALF); a locally approved adult foster care (AFC) home, or Supportive Housing approved by Behavioral Health.

- The Department for Aging and Rehabilitative Services (DARS) provides oversight of the policy of the AG Program. Local departments of social services determine eligibility and manage the recipient caseload.

AG - AUXILIARY GRANT
ALF - ASSISTED LIVING FACILITY
AFCH - ADULT FOSTER CARE HOME
SH - SUPPORTIVE HOUSING

- An Auxiliary Grant payment is issued monthly to the eligible individual. The AG payment, combined with a designated amount of the adult's monthly income, is used to pay the ALF, AFC, or SH provider a maximum monthly AG rate.

- The Virginia General Assembly determines the rate, which is adjusted periodically. The AG Program is 80 percent state funded and 20 percent locally funded

WHAT SERVICES ARE PROVIDED BY THE ALF?

- **Provision of a furnished room in a facility that meets applicable building and fire safety codes**
- **Housekeeping services based on the needs of the resident**
- **Meals and snacks, including extra portions and special diets**
- **Clean bed linens and towels as needed by the resident and at least once a week**

WHAT SERVICES ARE PROVIDED BY THE ALF?

- **Maintenance and Care**
- **Minimal assistance with personal hygiene, including bathing, dressing, etc.**
- **Medication administration as required by licensing regulations, including insulin injections**
- **Provision of generic personal toiletries, including soap and toilet paper**
- **Minimal assistance with care of personal possessions; care of personal funds if requested by the recipient and residence policy allows it; use of telephone; arranging transportation; obtaining necessary personal items and clothing; making and keeping appointments; and correspondence**
- **Securing health care and transportation when needed**
- **Providing social and recreational activities**
- **General supervision for safety**

HOW MUCH DOES IT COST TO LIVE IN AN ALF?

- The current cost of a licensed ALF in most of the state is $XXXX per month.

- In District 8, the cost is $XXXX per month.

HOW DO WE DETERMINE HOW MUCH THE AG IS AND HOW MUCH THE CLIENT/RESIDENT PAYS OUT-OF-POCKET?

1. Determine the amount needed to cover the cost of the ALF while also allowing the client to keep $87 for their personal needs. (This is the AG Limit.)

Determine the client's net countable income.

Subtract the net countable income from the AG Limit.

WHEN CALCULATING AN AUXILIARY GRANT, USE THE METHOD OF "WHAT DO THEY NEED VS. WHAT DO THEY HAVE?"

Mr. Jones is entering an Assisted Living Facility in Manassas, VA. The cost per month is $2391. Mr. Jones also needs $87 to meet his personal needs.

Mr. Jones needs a total of $2478/month.

Mr. Jones' only income is $1080 from SSA. He is allowed the $20 general income exclusion; therefore, his countable net income is $1060/month.

- **$2478 What he needs**
- **-1060 What he has**
- **$1418 The Auxiliary Grant full month**
- **(if he's eligible)**
-
- **...and how do I know if he's eligible?**

FUSION

Where collaboration and creativity SPARK positive change

AUXILIARY GRANT MANUAL

- Chapter A-Introduction
- Chapter B-Application Processing
- Chapter C-Non-Financial Requirements
- Chapter D-SSI Recipients' Eligibility
- Chapter E-Non SSI Resource Eligibility
- Chapter F-Non SSI Conditional Benefits
- Chapter G-Non SSI Resource Transfers
- Chapter H-Non SSI Income Exclusions
- Chapter I-Non SSI Income Sources
- Chapter J-Grant Computation and Issuance
- Chapter K-Supportive Housing
- Chapter L-Administrative Issues
- Transmittal-DARS-APSD-18

USING THE MANUAL

- **Chapter A provides a table showing step-by-step processing of determining eligibility for an Auxiliary Grant.**

- **Chapter B breaks down the logistics of who can apply; where to apply; information provided to the applicant; processing time frames of application and renewals; and other information needed in the process.**

- **While very similar to application processing for Benefit Programs, *always* consult the Auxiliary Grant manual for guidance.**

CHAPTER B – APPLICATION PROCESSING

- **A written and signed application is required for all initial applications, reapplications, and renewals.**
- **The application form to be used is the Application for Benefits.**
- **The Supplemental Renewal application 032-03-729A,**
- **and form 032-03-729 C, may be used for renewals.**

- **An application for AG is also an application for Medicaid and,**
- **if the individual incurred medical expenses in the three months prior to the month of application, it is also an application for retroactive Medicaid.**

- **- An Auxiliary Grant (AG) recipient is eligible for Medicaid if they meet the assignment of rights to medical support and third-party payments requirements. Medicaid M0320.102**

CHAPTER C - NON-FINANCIAL REQUIREMENTS

Both **SSI recipients and Non-SSI individuals must meet Non-Financial eligibility criteria** at initial application, redetermination, and throughout their eligibility period.

Each Non-Financial eligibility factor must be evaluated and documented on the Evaluation of Eligibility.

Documentation must state whether or not the applicant meets Non-Financial requirements.

CHAPTER C – NON-FINANCIAL REQUIREMENTS

- **Identity**
- **Covered Groups**
- **Virginia Residency**
- **Fugitive Felons & Parole Violators Status***
- **Social Security Number**
- **Level of Care Assessment (Screening)**
- **Residence in an ALF or AFCH**
- **Relationship to SSI**
- **Citizenship and Alienage**
- **Application for Other Benefits**

- ***Fugitive Felons are not eligible for an Aux Grant. There is no impact on MA eligibility.**

NON-FINANCIAL ELIGIBILITY

- **Level of Care Assessment Screening**

- **All residents of and applicants to an ALF who apply for an AG must be assessed to determine that they need the Level of Care provided by an ALF.**

- **This is essentially the same process as being screened for Medicaid payment of Long-Term Services and Support; however, the person residing in an ALF is not considered to be institutionalized.**

LEVEL OF CARE ASSESSMENT SCREENING
CH C.6

- **Residents must be assessed at least once every 12 months**

- **The reassessment is based on the date of the last assessment**

- **The assessment does not need to be performed in the same month of eligibility determination**

LEVEL OF CARE ASSESSMENT SCREENING CHAP C.6.2.3

- **Assessors use the "Uniform Assessment Instrument" (UAI) to record the outcomes of their assessments.**

- **Assessors use the "Medicaid Funded Long-term Care Service Authorization DMAS-96" or the electronic equivalent to notify the eligibility worker of the results of the initial assessments.**

- **The "Eligibility Communication Document" is to notify the EW of the results of the annual redeterminations.**

RESIDENCE IN AN ALF (OR AFCH)

- **The individual must be residing in an assisted living facility (ALF) that has been authorized to operate and is licensed by the Virginia Department of Social Services, or residing in an adult foster care home (AFCH) that has been approved by a local DSS.**

- **How do I verify that an individual is residing in an ALF?**

- **How do I know if the ALF is licensed?**

RESIDENCE IN AN ALF (OR AFCH) – VERIFICATION CHAP C.7.1.1.

- **Telephone contact with the individual at the facility,**

- **A visit to the individual at the facility by a social services department employee during the month of application or renewal**

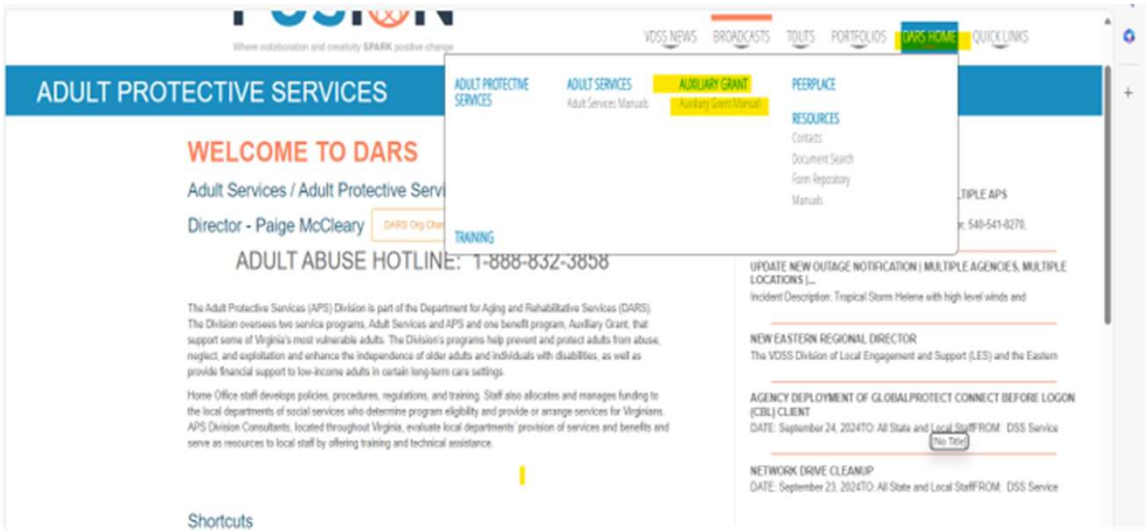
- **A statement from a department of social services worker that placement was made at the address on the ALF license for new applications, or**

- **A written statement from an individual unconnected to the ALF that the individual resides in the facility/home**

ASSISTED LIVING FACILITIES AUTHORIZATION TO OPERATE (LICENSING)

- **Verify that the ALF is licensed to operate and is approved to accept AG recipients by the viewing the AG Facilities Rates File on the FUSION website.**
- **If the facility is not listed, the facility is either not approved to accept AG recipients or is no longer licensed.**

- **Where do I find that information?**


VDSS NEWS
BROADCASTS
TOUTS
PORTFOLIOS
DARS HOME
QUICK LINKS
ADULT PROTECTIVE SERVICES
ADULT PROTECTIVE SERVICES
ADULT SERVICES
Adult Services Manuals
AUXILIARY GRANT
Auxiliary Grant Manual
PEERPLACE
RESOURCES
Contacts
Document Search
Form Repository
Manuals
TRAINING
WELCOME TO DARS
Adult Services / Adult Protective Servi
Director - Paige McCleary
ADULT ABUSE HOTLINE: 1-888-832-3858
The Adult Protective Services (APS) Division is part of the Department for Aging and Rehabilitative Services (DARS). The Division oversees two service programs, Adult Services and APS and one benefit program, Auxiliary Grant, that support some of Virginia's most vulnerable adults. The Division's programs help prevent and protect adults from abuse, neglect, and exploitation and enhance the independence of older adults and individuals with disabilities, as well as provide financial support to low-income adults in certain long-term care settings.
Home Office staff develops policies, procedures, regulations, and training. Staff also allocates and manages funding to the local departments of social services who determine program eligibility and provide or arrange services for Virginians. APS Division Consultants, located throughout Virginia, evaluate local departments' provision of services and benefits and serve as resources to local staff by offering training and technical assistance.
Shortcuts
UPDATE NEW OUTAGE NOTIFICATION | MULTIPLE AGENCIES, MULTIPLE LOCATIONS |...
Incident Description: Tropical Storm Helene with high level winds and
NEW EASTERN REGIONAL DIRECTOR
The VDSS Division of Local Engagement and Support (LES) and the Eastern
AGENCY DEPLOYMENT OF GLOBALPROTECT CONNECT BEFORE LOGON (CBL) CLIENT
DATE: September 24, 2024TO: All State and Local StaffFROM: DSS Service
NETWORK DRIVE CLEANUP
DATE: September 23, 2024TO: All State and Local StaffFROM: DSS Service

AUXILIARY GRANT

The Auxiliary Grant (AG) is an income supplement for individuals who receive Supplemental Security Income (SSI) and certain other aged, blind, or disabled individuals who reside in a licensed assisted living facility (ALF), locally approved adult foster care (AFC) home, or licensed supportive housing (SH) setting. The Department for Aging and Rehabilitative Services (DARS) administers the AG Program. Local departments of social services determine eligibility.

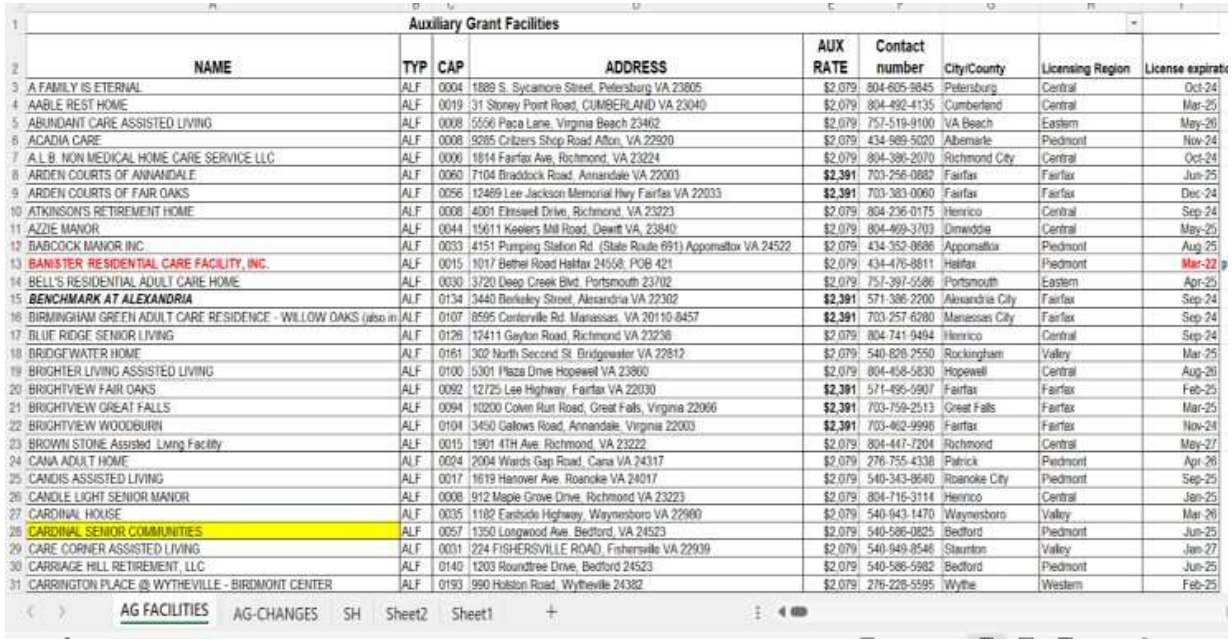
An AG payment is issued monthly to the eligible individual. The AG payment, combined with a designated amount of the adult's monthly income, is used to pay the ALF, AFC, or SH provider a maximum monthly AG rate. The Virginia General Assembly determines the rate, which is adjusted periodically. The AG Program is 80 percent state funded and 20 percent locally funded.

Resources and Procedures

- AG Newsletter
- Auxiliary Grant Computation Worksheet
- Auxiliary Grant in Supportive Housing Provider Operating Manual
- Auxiliary Grants-Facilities & Rates (effective 09/01/2024)
- Benefit Specialist SH Webinar PP
- SH Fact Sheet Blue Ridge Behavioral Care
- SH Fact Sheet Danville-Pittsylvania
- SH Fact Sheet Mt. Rogers
- SH Fact Sheet Piedmont

Auxiliary Grant Training

- Auxiliary Grant Coordinators' Meeting-October 2021
- Auxiliary Grant Coordinators' Meeting-March 2022
- Auxiliary Grant FAQ 2.2021
- Auxiliary Grant in Supportive Housing (PP)



Auxiliary Grant Facilities

NAME	TYP	CAP	ADDRESS	AUX RATE	Contact number	City/County	Licensing Region	License expirati
A FAMILY IS ETERNAL	ALF	0004	1889 S. Sycamore Street, Petersburg VA 23805	$2,079	804-605-9845	Petersburg	Central	Oct-24
AABLE REST HOME	ALF	0019	31 Stoney Point Road, CUMBERLAND VA 23040	$2,079	804-492-4135	Cumberland	Central	Mar-25
ABUNDANT CARE ASSISTED LIVING	ALF	0008	5556 Paca Lane, Virginia Beach 23462	$2,079	757-519-9100	VA Beach	Eastern	May-26
ACADIA CARE	ALF	0008	9265 Critzers Shop Road Afton, VA 22920	$2,079	434-989-5020	Albemarle	Piedmont	Nov-24
A.L.B. NON MEDICAL HOME CARE SERVICE LLC	ALF	0006	1814 Fairfax Ave, Richmond, VA 23224	$2,079	804-386-2070	Richmond City	Central	Oct-24
ARDEN COURTS OF ANNANDALE	ALF	0060	7104 Braddock Road, Annandale VA 22003	**$2,391**	703-256-0882	Fairfax	Fairfax	Jun-25
ARDEN COURTS OF FAIR OAKS	ALF	0056	12469 Lee Jackson Memorial Hwy Fairfax VA 22033	**$2,391**	703-383-0060	Fairfax	Fairfax	Dec-24
ATKINSON'S RETIREMENT HOME	ALF	0008	4001 Elmswell Drive, Richmond, VA 23223	$2,079	804-236-0175	Henrico	Central	Sep-24
AZZIE MANOR	ALF	0044	15611 Keelers Mill Road, Dewitt VA, 23840	$2,079	804-469-3703	Dinwiddie	Central	May-25
BABCOCK MANOR INC.	ALF	0033	4151 Pumping Station Rd. (State Route 691) Appomattox VA 24522	$2,079	434-352-8686	Appomattox	Piedmont	Aug-25
BANISTER RESIDENTIAL CARE FACILITY, INC.	ALF	0015	1017 Bethel Road Halifax 24558; POB 421	$2,079	434-476-8811	Halifax	Piedmont	Mar-22
BELL'S RESIDENTIAL ADULT CARE HOME	ALF	0030	3720 Deep Creek Blvd. Portsmouth 23702	$2,079	757-397-5586	Portsmouth	Eastern	Apr-25
BENCHMARK AT ALEXANDRIA	ALF	0134	3440 Berkeley Street, Alexandria VA 22302	**$2,391**	571-386-2200	Alexandria City	Fairfax	Sep-24
BIRMINGHAM GREEN ADULT CARE RESIDENCE - WILLOW OAKS (also in	ALF	0107	8595 Centerville Rd. Manassas, VA 20110-8457	**$2,391**	703-257-6280	Manassas City	Fairfax	Sep-24
BLUE RIDGE SENIOR LIVING	ALF	0126	12411 Gayton Road, Richmond VA 23238	$2,079	804-741-9494	Henrico	Central	Sep-24
BRIDGEWATER HOME	ALF	0161	302 North Second St. Bridgewater VA 22812	$2,079	540-828-2550	Rockingham	Valley	Mar-25
BRIGHTER LIVING ASSISTED LIVING	ALF	0100	5301 Plaza Drive Hopewell VA 23860	$2,079	804-458-5830	Hopewell	Central	Aug-26
BRIGHTVIEW FAIR OAKS	ALF	0092	12725 Lee Highway, Fairfax VA 22030	**$2,391**	571-496-0907	Fairfax	Fairfax	Feb-25
BRIGHTVIEW GREAT FALLS	ALF	0094	10200 Colvin Run Road, Great Falls, Virginia 22066	**$2,391**	703-759-2513	Great Falls	Fairfax	Mar-25
BRIGHTVIEW WOODBURN	ALF	0104	3450 Gallows Road, Annandale, Virginia 22003	**$2,391**	703-462-9998	Fairfax	Fairfax	Nov-24
BROWN STONE Assisted Living Facility	ALF	0015	1901 4TH Ave. Richmond, VA 23222	$2,079	804-447-7204	Richmond	Central	May-27
CANA ADULT HOME	ALF	0024	2004 Wards Gap Road, Cana VA 24317	$2,079	276-755-4338	Patrick	Piedmont	Apr-26
CANDIS ASSISTED LIVING	ALF	0017	1619 Hanover Ave. Roanoke VA 24017	$2,079	540-343-8640	Roanoke City	Piedmont	Sep-25
CANDLE LIGHT SENIOR MANOR	ALF	0008	912 Maple Grove Drive, Richmond VA 23223	$2,079	804-716-3114	Henrico	Central	Jan-25
CARDINAL HOUSE	ALF	0035	1102 Eastside Highway, Waynesboro VA 22980	$2,079	540-943-1470	Waynesboro	Valley	Mar-26
CARDINAL SENIOR COMMUNITIES	ALF	0057	1350 Longwood Ave. Bedford, VA 24523	$2,079	540-586-0825	Bedford	Piedmont	Jun-25
CARE CORNER ASSISTED LIVING	ALF	0031	224 FISHERSVILLE ROAD, Fishersville VA 22939	$2,079	540-949-8546	Staunton	Valley	Jan-27
CARRIAGE HILL RETIREMENT, LLC	ALF	0140	1203 Roundtree Drive, Bedford 24523	$2,079	540-586-5982	Bedford	Piedmont	Jun-25
CARRINGTON PLACE @ WYTHEVILLE - BIRDMONT CENTER	ALF	0193	990 Holston Road, Wytheville 24382	$2,079	276-228-5595	Wythe	Western	Feb-25

AG FACILITIES | AG-CHANGES | SH | Sheet2 | Sheet1

RELATIONSHIP TO SSI CHAP C.8 P 26

- **AG is limited to individuals who are SSI recipients and those who meet all of the SSI eligibility requirements except for income. This requires that an individual's SSI eligibility be evaluated. If an individual is ineligible for SSI for any reason other than income, the individual is ineligible for AG under SSI recipient policy guidelines.**

- **The eligibility worker must determine if an individual has applied for SSI within the last 12 months and if so, the results of that application. Approval or denial of the application affects AG eligibility. If the individual has not applied for SSI within the last 12 months, the worker must determine if the individual must file an SSI application.**

DEFINITION OF SSI RECIPIENT CHAP D, PAGE 1

- **An SSI recipient is an individual that has applied for, been approved for, and is receiving a money payment from the Supplemental Security Income.**

- **Individuals whose SSI payments have been suspended are not receiving a money payment and are not considered SSI recipients during their suspension period.**

- **Individuals who are determined to be "presumptively eligible" for SSI receive an SSI payment but are not considered SSI recipients for AG purposes.**

RELATIONSHIP TO SSI IS THE NON-FINANCIAL REQUIREMENT

- **Example:**

- **The applicant is Aged, Blind, or Disabled; has less than $2,000 in resources; and has income in the amount of $1,250 per month.**

- **Do they need to apply for SSI to meet the non-financial requirements for Auxiliary Grant Eligibility?**

- **No. They would not be eligible for SSI because they are over the SSI income limit.**

CHAPTER D – SSI RECIPIENT'S ELIGIBILITY

- **Auxiliary Grant is a federally mandated program established to supplement the SSI program. As such, the AG program is required to use SSI policy to determine eligibility. Because SSI and AG use basically the same financial eligibility rules, an SSI recipient is deemed financially eligible for AG.**

  Verification that an individual is an SSI recipient establishes that his/her income and resources have been verified and evaluated and that AG financial eligibility exists.

- **The SSI recipient's income is used to calculate the Auxiliary Grant.**

CHAPTER E – NON-SSI RESOURCE ELIGIBILITY

- ***The AG manual has 59 types of resources to consider!***

Which of these two policy citations mirrors ABD Medicaid?

- **An item received in the current month is income for the current month. If held by the individual until the following month, that item is subject to resource counting rules. Ch E.2**

- **A resource's value is its value as it existed on the first moment of the first day of the month in which it is being evaluated. Ch E.3**

CHAPTER E – NON-SSI RESOURCE ELIGIBILITY

- **Resource Limit for AG**
  $2000 for 1
  $3000 for 2

- **Resource Limit for MA**
  $2000 for 1
  $3000 for 2

CHAPTER E – NON-SSI RESOURCE ELIGIBILITY

- **Automobile ownership**
- **Reasonable Effort to Sell**
- **Burial Funds**

- **Chapter E – Non-SSI Resource Eligibility**
-
- **“Automobile” means any vehicle used for transportation. Ch E 16**
-
- **When an individual has received nine months of Conditional Benefits due to his ownership of excess real property during which he/she made continuing but unsuccessful reasonable efforts to sell, the reasonable effort to sell exclusion may be applied in determining his/her eligibility for regular AG benefits. Ch E 10**
-
- **Use of excluded burial funds for a purpose other than the burial arrangements of the individual or the individual's spouse for whom the funds were set aside, is considered misuse. Misuse of excluded burial funds may result in a penalty. Ch E 18.3**

CONDITIONAL BENEFITS – CHAPTER F

- **A non-SSI individual (or couple) who meets all non-resource eligibility requirements, but fails to meet the resources requirement due solely to excess non-liquid resources, may qualify for the conditional exclusion of those excess resources.**

- **An exclusion exists for excess non-liquid resources for a set period of time if the individual agrees to take action to dispose of the excess non-liquid resources and to repay the amount of the AG Conditional Benefits he/she will receive during the disposal period.**

- **The AG benefits paid during the period the exclusion is applied are Conditional Benefits (CB), benefits paid on the condition they be repaid.**

- **Individuals who receive AG as “Conditional” SSI recipients do not meet the requirements for this (the ABD) covered group. M0320.102.B**

RESOURCE TRANSFER (AG) VS ASSET TRANSFER (LTSS) CHAPTER G (STEP-BY-STEP INSTRUCTIONS)

- **Transferring ownership of a resource may affect the value of an individual's countable resources which in turn can affect AG eligibility. Therefore, when an individual alleges that a resource has been transferred within 36 months prior to his/her application for AG or within his/her eligibility period, it is necessary to develop the issue to determine the effect on AG eligibility.**

- **Like the LTSS policy, there are exceptions as to what can be transferred and to whom.**

- **Unlike LTSS policy, the period of ineligibility begins the first day of the month after the month that the resource was transferred.**

CHAPTER H - INCOME EXCLUSIONS
CHAPTER I – INCOME SOURCES

- **In Chapter I there are 68 sources of income addressed**
- **A typical Auxiliary Grant applicant will have unearned income from SSA and/or SSI.**
- **Chapter H has step-by-step instructions for applying income exclusions.**
- **Most frequently used exclusions (other than General and Earned income): Community Expense Exclusion (for month of entry into ALF only) and the Guardianship Fee Exclusion.**

DISCHARGE ASSISTANCE PROGRAM (DAP)

- **DAP funds are state funds given to the Department of Behavioral Health and Developmental Services (DBHDS) to be administered by the local Community Service Board (CSB) or Behavioral Health Authority (BHA)**

- **DAP funds are considered funds from a governmental program and not counted as income to the individual. Services and/or goods paid by DAP funds will not be counted as income. However, DAP funds used for room and board are counted as income as the primary payment source while any AG payment will become secondary.**

- **Ch I 45.3 and 45.3.1**

- Questions?

- Thank you!