



Assisted Living Programs Sunrise Set-Aside and The Kensington Policy and Procedures

Housing and Human Services

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Note: Please carefully read the following information on both programs. There are many similarities, but there are also differences.

Sunrise Low and Moderate Income Set-Aside Program

1. Client Eligibility

- **Age:** Individuals must be at least 62 years old. An individual under 62 may accompany a spouse who is 62 or over. Individuals with a disability, regardless of age, may be eligible to occupy either a low- or moderate-income set-aside bed at Sunrise. At any given time, only one low-income bed may be occupied by a person with a disability who is under age 62.
- **Income:** Individuals with low and moderate incomes are eligible for assisted living service at Sunrise. Criteria for eligibility are based on the income guidelines circulated by the U.S. Department of Housing and Urban Development (HUD). An income guideline chart is attached.
 - Low income is defined as less than 50% of the area median income (adjusted for family size).
 - Moderate income is defined as 50% to 80% of the area median income (adjusted for family size).
- **Disability:** Individuals with a disability, regardless of age, may be eligible to occupy either a low- or moderate-income set-aside bed. Of the low-income beds, only one may be occupied by a person under 62.
- **Residence:** Set-aside beds are reserved for residents of the City and members of their immediate families (i.e. mother, father, grandfather, grandmother, brother, sister, father-in-law, mother-in-law, or child). Residents who have been living in the City for at least two years receive first priority, but if there is no one in that category to fill the bed, it can be offered to a resident who has been in the City for a shorter period of time.
- **Care Level Needs:** Applicants must meet Sunrise's criteria for admission with regard to physical and mental health. Sunrise provides personal care and supportive services to people who need help with daily living activities as a result of physical or cognitive impairments. Sunrise is designed for individuals who need assistance with daily living activities and do not need skilled nursing care on a daily basis.

2. Application Procedures

A list of City residents interested in seeking low and moderate-income set-aside beds at Sunrise is maintained by City of Falls Church Housing and Human Services.

- **Documentation:** In order to verify eligibility, documentation will be required prior to the intake interview with Sunrise.

Income – Documentation of income from all sources for the previous two years. Signed copies of federal income tax returns, as well as Social Security and retirement award letters if applicable are required. Income includes contributions from family members or other parties. To verify income from family members or other parties, a notarized letter along with bank deposits must be included.

Residence – Documentation of City residency is required for the applicant or eligible immediate family member. This includes the City real estate tax bill or lease/rental agreement.

Immediate Family Relationship Status (if applicable) – Documentation may include birth certificate or sworn and notarized statement.

Disability – Acceptable disability documentation may include a Social Security or Veteran’s award letter.

3. Costs for Care

Approved applicants will pay 80 percent of their gross income from all sources minus health insurance premiums (e.g. Medicare) for the basic monthly rental fee at Sunrise. Deposits/furnishing fees and additional costs for services available through the Care Plus program including, but not limited to, medication distribution and administration, incontinence care, transportation, feeding, toileting are exclusive of the set-aside Agreement. These additional costs are the responsibility of the applicant/resident or family, and are not included in the room and board amount. In the event there is a community spouse, all income will be taken into consideration then divided in half.

4. State Auxiliary Grants

Sunrise may utilize the State Auxiliary Grant program in meeting the set-aside requirement for low-income set-asides. Sunrise may not request additional fees for Plus Care services from residents utilizing the State Auxiliary Grant program or their families. The State Auxiliary Grant program does not allow any additional fees. Further, the City Attorney has opined that it is not discriminatory for Sunrise to have different policies regarding additional fees for different programs.

5. Complaints/Appeals Process

Concerns regarding the policy and procedures for set-asides at Sunrise may be directed to the Human Services Specialist in Housing and Human Services. Requests for reconsideration of the Human Services Specialist’s decisions may be made to the Department Director whose decisions are final.

The Kensington Subsidy Program

1. Client Eligibility

- **Age:** Individuals must be at least 62 years old. An individual under 62 may accompany a spouse who is 62 or over.
- **Income:** Individuals with low and moderate incomes are eligible for assisted living services at The Kensington. Criteria for eligibility are based on the income guidelines circulated by the U.S. Department of Housing and Urban Development (HUD). An income guideline chart is attached.
 - Low income is defined as less than 50% of the area median income (adjusted for family size).
 - Moderate income is defined as 50% to 80% of the area median income (adjusted for family size).
- **Assets:** No more than \$40,000 liquid or non-liquid assets, including home equity, are allowed in order to be eligible for the subsidy. If there is a community spouse living in the home, the home equity will not be taken into consideration unless the property is sold.
- **Residence:** The subsidy program is reserved for residents of the City and members of their immediate families (i.e. mother, father, grandfather, grandmother, brother, sister, father-in-law, mother-in-law, or child). Residents who have been living in the City for at least two years get first priority, but if there is no one in that category to fill the bed, it can be offered to a resident who has been in the City for a shorter period of time.
- **Care Level Needs:** Applicants must meet The Kensington's criteria for admission with regard to physical and mental health. The Kensington provides personal care and supporting services to people who need help with daily living activities as a result of physical or cognitive impairments. The Kensington is designed for individuals who need assistance with daily living activities and do not need skilled nursing care on a daily basis.

2. Application Procedures

A list of people interested in the subsidized program beds at The Kensington will be maintained by Housing and Human Services.

- **Priority:** Applicants on the interest list are assigned a priority category. Priority one will be given to seniors with income lower than 30% of the HUD Median Income. Priority two will be given to seniors with income between 30% and 50% of the HUD Median Income. Priority three will be given to seniors with income between 50% and 80% of the HUD Median Income. An income guideline chart is attached.
- **Documentation:** In order to verify eligibility, documentation will be required prior to the intake interview with The Kensington.

Income – Provide documentation of income from all sources for the previous two years. Signed copies of federal income tax returns, as well as Social Security and retirement award letters, if applicable, are required. Income includes contributions from family members or other parties. To verify income from

family members or other parties, a notarized letter along with bank deposits must be included.

Assets – Applicants must submit the most recent bank or account statements for each asset and may include federal income tax returns, investments, money market funds, and property and/or mortgage statements.

Residence – Documentation of City residency is required for the applicant or eligible immediate family member. This may include the City real estate tax bill or lease/rental agreement.

Immediate Family Relationship Status (if applicable) – Documentation may include a birth certificate or sworn and notarized statement.

3. Costs for Care

Approved applicants will pay 80 percent of their gross income minus health insurance premiums (e.g. Medicare) from all sources for their care. In the event room and board and the cost of care exceed the amount of the accounting subsidy, the resident will have pay to the difference or make arrangements to transfer to a different program or facility. In the event there is a community spouse, all income will be taken into consideration then divided in half.

4. State Auxiliary Grants

The Kensington will utilize the State Auxiliary Grant program and may not request additional fees for services from residents or their families. The State Auxiliary Grant program does not allow any additional fees.

5. Complaints/Appeals Process

Concerns regarding the policy and procedures for The Kensington subsidy program can be directed to the Human Services Specialist in Housing and Human Services. Requests for reconsideration of the Human Services Specialist's decisions may be made to the Department Director whose decisions are final.

Interest List Guidelines

All applicants for the City's assisted living program must contact Housing and Human Services to be placed on the interest list maintained by the City.

When a vacancy occurs, applicants will be contacted according to their place on the interest list and, when applicable, their priority. In instances where an applicant needs a specialized placement (i.e. dementia unit) and none is available, the next person on the interest list will be contacted.

Applicants who are selected to apply for either assisted living program and decline to do so may request that their name remain on the interest list. These applicants will be placed at the bottom of the list.

City residents who are on the interest list and move out of the area to receive care may request that their name remain on the interest list.

Falls Church Assisted Living Program Definitions

Elderly person shall be deemed to be a person who has attained the age of 62 or who is the spouse of a person who has attained the age of 62 and who resides in the same living unit with such spouse.

Community Spouse refers to the spouse who will not be joining the other to live together in the assisted living facility.

City residents shall be those persons, or their immediate family members, living within the City of Falls Church. Residents who have been living in the City for at least two years get first priority. However, if there is no one in that category to fill the bed, it can be offered to a resident who has been in the City for a shorter period of time.

Immediate family refers to one's parents, wife or husband, children, grandparents, brothers, sisters, mother-in-law, or father-in-law.

Policy of Non-Discrimination on the Basis of Disability

The City of Falls Church is committed to the letter and spirit of the Americans with Disabilities Act. This document will be made available in alternate format upon request. Call 703-248-5005, (TTY 711).

The City of Falls Church does not discriminate on the basis of disability in its employment practices or in the admission to, access to, or operations of its services, programs, or activities. Cindy Mester, 300 Park Avenue, Falls Church, Virginia 22046 has been designated to coordinate compliance with the ADA non-discrimination requirement.



Attachment

City of Falls Church Income Limits – Fiscal Year 2017

| Number of Persons in Household | 1 | 2 |
|---------------------------------------|----------|----------|
| 50% of HUD Median Income | \$38,605 | \$44,120 |
| 80% of HUD Median Income | \$61,768 | \$70,592 |
