



**STATE OF TENNESSEE
DEPARTMENT OF HUMAN SERVICES**

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MEMORANDUM

MA-05-20

**TO: DISTRICT, COUNTY AND AREA OFFICES
FAMILY ASSISTANCE SERVICE CENTERS
DIVISION OF APPEALS AND HEARINGS**

FROM: MARY ANNE RUDOLPH, DIRECTOR, MEDICAID AND TENNCARE POLICY

DATE: DECEMBER 21, 2005

SUBJECT: CORRECT USE OF THE "QUALIFIED INCOME TRUST" FORM (HS-2906)

The Qualified Income Trust (QIT) form (HS2906) which is attached to Bulletin 44, November 30, 2005 is meant to serve as a model for eligibility counselors to use when reviewing a QIT. The form was not created to be used or to be distributed as a fill-in-the-blank form by the eligibility counselor, the client, an attorney, or a bank. Also, please remember it is never the responsibility of a bank to establish a Trust.

While the form is meant to serve as a model for the eligibility counselor to use when reviewing a QIT, DHS staff when in communication with an attorney about the process of establishing a QIT as it relates to Tennessee policy, may send a copy of form HS-2906 to the attorney.

Legal Aid and the Ombudsman's attorneys have volunteered to assist applicants/recipients in creating a QIT. Because the QIT is a legal document, and in order to ensure the Trust adheres to all the federal guidelines, you may suggest the applicant/recipient contact one of the agencies listed above.

In no case are DHS staff to assist in completing a QIT document.

If you have any questions concerning this memo, please route them through usual channels.

MAR:MT:bb