

## Verification Checklist

### Long Term Care – NH & HCBC/CFI Medicaid

**Please complete an application Form 800 and bring to Local District Office or Servicelink to schedule an appointment for a face-to-face interview.**

In order to serve you better, **please provide COPIES** of the following documents at the interview. If you experience any problems obtaining the documents, you will be given 10 additional days after the interview to provide any missing verifications. Please contact your family services specialist if you are having an issue obtaining verification.

Effective 2/8/06, the Federal and State Laws the Department must comply with a review of assets/resources owned by yourself, joint with spouse or jointly with another person for 60 months prior to the application.

**IMPORTANT: Please note that the resource limit for Medicaid is \$2,500. You will need to provide documentation with bank/financial statements verifying that your total resources are \$2,500 or less at the interview. You will be responsible for any bill at the nursing home until the date you can verify that your total resources fell below \$2,500.**

If you are married and have a spouse in the community, A **Resource Assessment** is required for nursing home care. A Resource Assessment protects some of your assets for your spouse in the community after you have been hospitalized and it is anticipated that you will require Long Term Care Assistance for 30 consecutive days or longer.

The Department through a cross match with Social Security obtains verification of Citizenship. On occasion, the Department does require proof; a request will be mailed after the interview.

**Authorized Representative**, General Power of Attorney, or Guardianship

**Social Security #** and/or Claim Number if different and Veterans Claim Number

**Marital Status** – Marriage certificate, death certificate, divorce decree or legal separation papers

**Lookback: All Assets for the past 60-months from date of application continuing back 60 months will be reviewed.**

### **Assets/Resource**

- ✓ Bank statements for all account with your name, with spouse, jointly with others– Checking, Savings, CD's, money Market, Stocks/Bonds, IRA, etc as well as copies of all checks
- ✓ Annuities – Complete contract and disbursements
- ✓ Trust – Complete trust documents, all assets placed within the trust for the past 60 months, whose money was used to fund the trust
- ✓ Real property owned by application, with spouse, or with others, including Life Estate. Copies of deed(s), occupancy status and current market value
- ✓ Life Insurance – copies of the entire policy(s), Face Value and current cash value
- ✓ Burial contract from funeral home to include the list of services
- ✓ Burial plot – deed or other verification from the cemetery

### **Income**

- ✓ Proof of all income – award letter, annuities, etc

### **Spousal information**

- ✓ Proof of all income and expenses – pay stubs, award letters, annuity payments, household expenses

### **Health Insurance**

- ✓ Health Insurance card(s), copy current premium statement

### **Court ordered fees**

- ✓ Copy of current court order

**History of residence for the past 3 years (if you resided in subsidized housing the Department requires addresses before the subsidized housing.**