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ELDER LAW MINUTE

The process of applying for Medicaid benefits is not a simple one. The County office of the Department of Family and Children Services (DFCS) is responsible for determining eligibility. You apply in the County where the nursing home is located. You start the process by filling out Form DHR-297. When DFCS receives the form, they assign it to a case worker. The case worker then sends you either an appointment letter or a checklist requesting verification of several critical elements of the case. Typically, you have 10 days to supply this information. Because the deadline is so close, I strongly recommend that you have all of your information together before you submit the application. And, don't bother submitting an application until you are sure that you qualify for assistance. Here is a general list of what DFCS will want.

Social Security Card, Medicare Card and Birth Certificate, Picture ID
Health and Rx Insurance Cards (front and back)
Power of Attorney
Application for V.A. Benefits
Bank statements covering the last three months (all numbered pages)
If latest bank statements cut off before the Effective Date, interim statements through at least the Effective Date
Value of C.D.s as of the Effective Date verified by the bank
IRA Statements for the three months preceding the Effective Date
Balance verified by nursing home in the patient trust fund account as of the Effective Date
Investment statements for the last three months (all numbered pages)
Life Insurance Policies - Cash Values as of the Effective Date
Vehicle Tag Receipts
Real Estate Tax Bills and Deeds
Cemetery Plot Deed and Pre-need Burial Contract
Safety Deposit Box Inventory as of the Effective Date
Statements for the last three months of any account closed within three months of the Effective Date
Proof of closure of any investments liquidated within three months of the Effective Date
Social Security Proof of Benefit (POB)
Pension POB
IRA Distribution Payment
Rental Income - Lease, Tax and Insurance Bills
Verification of Health and Rx Insurance Premiums from Insurance Company
Transfers - Proof of Amount and Date (Copies of Checks)
Transfers back to A/R

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