

LIST OF DOCUMENT TYPES ENCLOSED

RFA Section

- AFA (application for Assistance)
- Screening for Expedited Medicaid Appointment
- Interim Contact
- Medicaid/Medicare Buy-In Application

PRS Section

Identification:

- Driver's License
- State ID
- Social Security Card
- Medicare Card
- Birth Certificate

Legal/Court Records:

- Marriage/Divorce Records
- Guardianship papers/POA
- Death Certificate
- Financial Release
- Affidavit for Designated Representative
- Designation of Resources for Burial

Other:

- Insurance Cards
- Insurance Documents

Medical Section

Confidential:

- Confidential Medical Records

Non-Confidential:

- Informed Consent for Long Term Care Assessment
- Patient transfer and Continuity of Care (3008)
- Doctor's statement
- Immunizations
- Authorization to Release Medical Information
- Medical Bills

VR Section

Income:

- Pay Stubs
- Income Award Letters
- Verification of Income/Asset Forms
- Verification of Railroad Retirement
- Self Employment Records

Assets:

- Bank/Financial Statements
- Life Insurance Policies
- Life Insurance Cash Values
- Annuities
- Retirement Funds
- Burial Contracts
- Vehicle Documentation
- Deeds/Property Tax Records
- Trust Documents
- Qualified Income Trust
- Trust for the Disabled Under 65
- Pooled Trust for the Disabled

Case Number: _____

PIP SS#: _____

PIP Name: _____

PIP PIN#: _____

DOB: _____

Webapp#: _____

150 BOOKMAN OLD STYLE

11 BOOKMAN OLD STYLE

VR

Case Number: _____

PIP SS#: _____

PIP Name: _____

PIP PIN#: _____

DOB: _____

Webapp#: _____

72 BOOKMAN OLD STYLE

Assets

Bank/Financial Account

26 BOOKMAN OLD STYLE

Acct Type & #: _____

Name of bank or company: _____

Time span: _____

Pages: _____

RFA

Case Number: _____

PIP SS#: _____

PIP Name: _____

PIP PIN#: _____

DOB: _____

Webapp#: _____

Request for Assistance

Type:

- AFA (Application for Assistance)**
- Screening for Expedited
Medicaid Appointments**
- Interim Contact**
- Medicaid/Medicare Buy-In
Application (QMB/SLMB/QI1 only)**

Pages: _____

PRS

Case Number: _____

PIP SS#: _____

PIP Name: _____

PIP PIN#: _____

DOB: _____

Webapp#: _____

Identification

Type:

Driver's License

State ID

Social Security Card

Medicare Card

Birth Certificate

Other _____

Pages: _____

PRS

Case Number: _____

PIP SS#: _____

PIP Name: _____

PIP PIN#: _____

DOB: _____

Webapp#: _____

Legal/Court Records

- Marriage/Divorce Records
- Guardianship papers/POA
- Death Certificates
- Financial Release
- Affidavit for Designated Representative
- Designation of Resources for Burial
- Other

Pages: _____

PRS

Case Number: _____

PIP SS#: _____

PIP Name: _____

PIP PIN#: _____

DOB: _____

Webapp#: _____

Other

- Insurance Cards
- Insurance Documents
 - Health
 - Auto
 - Homeowner
 - Flood
 - Other

Pages: _____

MIED

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Confidential

Confidential Medical Records

Pages: _____

MED

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Non-Confidential

Type:

- Informed Consent for Long Term Care Assessment**
- Patient Transfer and Continuity of Care (3008)**
- Doctor's Statement**
- Immunizations**
- Authorization to Release Medical Information**

Pages: _____

MIED

Case Number: _____
PIP SS#: _____
PIP Name: _____
PIP PIN#: _____
DOB: _____
Webapp#: _____

Medical Bills

Pages: _____

VR

Case Number: _____

PIP SS#: _____

PIP Name: _____

PIP PIN#: _____

DOB: _____

Webapp#: _____

Earned Income

- Pay Stubs
- Verification of Income/Loss of
Income Form CF-ES 2622
- Self Employment Records
- Other _____

Pages: _____

VR

Case Number: _____
PIP SS#: _____
PIP Name: _____
PIP PIN#: _____
DOB: _____
Webapp#: _____

Unearned Income

- Pay Stub
- Income Award Letter/Cost of Living Adjustment Notice:
 - SSA
 - SSI
 - VA
 - Pension: _____
- Other _____

Pages: _____

VR

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Assets

Bank/Financial Account

Acct Type & #: _____

Name of bank or company: _____

Time span: _____

Pages: _____

VR

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Assets

Life Insurance Policy

Name of company: _____

Policy # _____

Pages: _____

VR

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Assets

Burial Contract

Name of company: _____

Contract #: _____

Pages: _____

VR

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Assets

Annuity

Name of company: _____

Policy # _____

Attachments:

- Policy
- Amortized payment schedule

Pages: _____

VR

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Assets

Retirement Fund

Acct Type & #: _____

Financial Institution: _____

Time span: _____

Pages: _____

VR

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Assets

Burial Contract

Name of company: _____

Contract #: _____

Pages: _____

VR

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Assets

Vehicle Documentation

Attachments:

- Title
- Registration

Pages: _____

VR

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Assets

Real Property

Attachments:

- Deed
- Property Tax Record
- Other: _____

Pages: _____

VR

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Assets

Trust Documents

Attachments:

- Trust
- Schedule A
- Other: _____

Pages: _____

VR

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Assets

Qualified Income Trust

Attachments:

- Trust
- Proof of bank account funding

Pages: _____

VR

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Assets

Trust for the Disabled Under 65

Attachments:

- Trust
- Proof of disability

Pages: _____

VR

Case Number:	_____
PIP SS#:	_____
PIP Name:	_____
PIP PIN#:	_____
DOB:	_____
Webapp#:	_____

Assets

Pooled Trust for the Disabled

Attachments:

- Trust
- Proof of disability

Pages: _____