

# Applying for Medicaid Long Term Care Services

## Long Term Care Pre-Application Checklist

This flyer will let you know what information is needed to apply for **Louisiana Medicaid** to help pay for long term care in a nursing facility, group home, developmental center, or for Home and Community Based Waiver services.

You may apply in person or over the phone. To schedule an appointment, call 1-888-342-6207 (toll-free) or your local Medicaid office at \_\_\_\_\_. If you are deaf or hard of hearing and have a TTY text telephone, call 1-877-456-1172.

Even if the applicant already gets Medicaid through another Medicaid program (like SSI), you will still need to make a separate application for Long Term Care Medicaid.

### What information will you need to give Medicaid?

Medicaid will ask you for the items below that apply to the person who needs long term care. It will speed up the application process if you have these things with you at the time of your appointment. If you are unable to get some of these documents, please check with a **Louisiana Medicaid Employee**. There may be other things that can be used.

**Special Note:** If the applicant is under age 18, some items will be needed for their parents. If the applicant is married, some items will be needed for their spouse **unless the spouse already receives Long Term Care Medicaid**.

Check if this Applies	Check If you have Collected the Item	To Prove:	Item Needed:
		Birth/Citizenship ( <i>if applicant does not receive Social Security, SSI, or Medicare</i> )	Birth certificate, U.S. Passport, <b>OR</b> Hospital Birth record
		Social Security Numbers ( <i>for applicant, spouse, and parents</i> )	Social Security Cards (if available)
		Marriage ( <i>not needed if spouse gets Long Term Care Medicaid</i> )	Marriage Certificate
		Guardianship, Power of attorney, or Interdiction	Legal documents filed in a Parish courthouse
		Alien Status ( <i>if applicant is not a U.S. citizen</i> )	Permanent Resident Card (Green Card) or other forms from U.S. Citizenship and Immigration Services
		Succession ( <i>if applicant is widowed</i> )	Succession documents filed in a Parish Courthouse
		Medicare	Medicare Card (if available)
		Health insurance, Medicare supplement, long term care insurance, Medicare prescription drug plan	Copy of front and back of insurance cards
		Health insurance premium	Bill from insurance company or bank statement if premium is drafted from a bank account

Check if this Applies	Check If you have Collected the Item	To Prove:	Item Needed:
		Lump sum payments received within the last three years from Social Security, lawsuits, or from anywhere else	Documents showing amount received and reason for receipt
		Gross income before withholdings ( <i>for applicant, spouse, and parents</i> ) for <b>ALL</b> incomes such as employment, retirement, pension, annuity, VA, Railroad Retirement, mineral rights, worker's comp, child support, reverse annuity mortgage, royalties, rental income, money received from friends or relatives, or <b>anything else received</b> either monthly or every so often.	Check stub, 1099 tax notice from last year, most recent statement of COLA (cost of living adjustment), or letter from the income source; You do not need to have proof of Social Security or SSI. <b>Note: Direct deposit shown on a bank statement will show an amount, but more proof is needed.</b>
		Certificates of deposit, stocks, bonds, mutual funds, IRAs, 401-Ks, Keoghs, retirement accounts, and annuities ( <i>for applicant, spouse, and parents</i> )	Statement of accounts showing current values
		Savings bonds	Copies of savings bonds
		<b>ALL</b> bank accounts ( <i>for applicant, spouse, and parents</i> )	<b>ALL PAGES</b> of the most recent bank statement <b>for ALL bank accounts</b> , showing names on the accounts, account numbers, name and address of bank, and all deposits and withdrawals to accounts
		Burial or funeral accounts at a bank ( <i>for applicant, spouse, and parents</i> )	Most recent bank statement
		Pre-arranged burial contracts with funeral homes ( <i>for applicant, spouse, and parents</i> )	A copy of the contract showing the value and items/services included
		Burial space such as mausoleum or plot ( <i>for applicant, spouse, and parents</i> )	Statement that shows the value of the burial space and how much is owed
		Value of any property owned ( <i>other than applicant's home</i> ). Ownership may be either in part or in whole, bought or inherited ( <i>for applicant, spouse, and parents</i> ).	Proof of the current fair market value, as stated by someone who has knowledge of determining fair market values, like an appraiser, realtor, or bank representative; also proof of what interest the applicant owns in the property
		Ownership of home property ( <i>for applicant, spouse, and parents</i> )	Tax assessment from assessor's office
		Trust ( <i>for applicant, spouse, and parents</i> )	Copies of trust documents filed at a courthouse
		Vehicle ownership including recreational, such as R.V. or boat ( <i>for applicant, spouse, and parents</i> )	Title or vehicle registration. The amount owed is needed if more than one vehicle is owned.

Check if this Applies	Check If you have Collected the Item	To Prove:	Item Needed:
		Life or burial insurance if the total face value for all policies is more than \$10,000 for each person ( <i>for applicant, spouse, and parents</i> )	Copies of all life/burial policies showing the face values
		Contents of a safe deposit box ( <i>for applicant, spouse, and parents</i> )	Statement by a third party who has viewed the contents, such as a bank employee
		Items transferred (sold, given away, or deed changed) during the last 3 years such as house, land, vehicles, cash, or bank accounts ( <i>for applicant, spouse, and parents</i> ).	Courthouse record, act of donation, signed agreement of donation, or bill of sale (including the value of what was given away, sold, or traded, and what was received in return)
		Paid or unpaid medical bills for services received within the last three months (if applying for Medicaid coverage for these months)	Medical bills from doctor, hospital, lab, x-ray, etc. for services received within the last three months

**Please note:** Do not make any changes to any health insurance coverage before speaking with the applicant's health insurance company, doctors, **and** a Louisiana Medicaid Employee. Once a health insurance policy or Medicare supplement is cancelled, it is often difficult or impossible to get coverage again when the applicant leaves the nursing facility or they no longer get Waiver services. While the applicant is getting long term care, Medicaid allows the applicant to keep the income needed to pay for **most health insurance premiums**.