

Medicaid Applications – Best Practices

Pocopson Home – Chester County

CFO Tom Mancill

Pre Admission:

- Admission department hands out to family:
 - Pocopson Home Admission form which gathers all information needed to complete a PA600.
 - Admissions department & Resident Assessment department pre-populates the MA-51 form and gives to family prior to Admission. Family gets Primary Physician to sign.
 - Often gets signed & handed back to Pocopson prior to Admission.
 - Admissions department send out a Checklist of items needed for Medical Assistance Application (See next two Slides).

Please provide the following documents
photocopied and available prior to
Admission

- Medicare card, Social Security card, Access card (Medicaid card)
- All medical insurance cards (copies of front and back)
- Receipt/information verifying last paid health insurance premium
- Military discharge papers (applicant or deceased spouse who was a veteran) marriage certificate and death certificate of deceased veteran
- Proof of identity (driver's license, passport, birth certificate, or military records showing place of birth)
- If foreign born, a copy of naturalization papers or permanent alien registration card
- Power of attorney or guardianship documents
- Living Will (Advanced Directives for Health Care)
- Humanity gift registry or Donor of Organs card
- Prearranged and/or prepaid burial contracts (applicant and/or spouse)

For Admissions where Medicaid Assistance will be applied for please provide:

- Gross Income Verification (Social Security, Pension, Annuity)
- All life insurance policies, statement showing cash surrender and face value
- Long-term care insurance policy (applicant and /or spouse)
- Monthly bank statement for past 5 years will be needed for the MA application
- Copy of trust fund agreements, if established within the last 5 years (applicant and/or spouse)
- Stocks, Savings Bonds, certificate of deposits, IRA's and /or any other securities
- Property deed (residential or nonresidential)
- Settlement sheet if any property was sold within the past 60 months
- Car titles
- Mobile home title
- Bank Statements: January & June 2017, 2018, 2019. All month Statements 2020, 2021, 2022.

Admission:

- Accounting department meets with family & discusses Medical Assistance Application process.
- Accountant tracks each Admission on a spreadsheet.
 - Lists Asset balance @ time of Admission.
 - Calculates when to submit PA600.
 - Tracks each case thru 'approval'.

Post Admission: Application Process

- Accounting department submits Rep Payee documentation to Social Security Administration as soon as possible after the Admission.
- Accounting department contacts the family to change any Direct Deposits of other Incomes/Pensions to Pocopson Home's bank as soon as possible as well.
- Accountant tracks each case, guides families thru the Medicaid Application process.
- Accountant often sends documentation for family to the CAO.
- Accountant 'Appeals' any denied cases and attends to all Telephone Appeal Hearings.

Post Admission: PA162 'approval' notice

- After receiving the PA-162 showing 'Approval', Accountant will contact family to go over the Cost of Care Calculation section.
- Accountant often sends them a spreadsheet to breakdown Gross Income to Net Income due Nursing Facility. This is helpful on Spousal cases.
- Accountant will also go over any Health Insurance premiums for Secondary Insurance plans. That needs to be handled by Accounting so that it gets captured & spenddown as Value Code 35 on the monthly UB04 Bill.
- Accountant also verifies all Retro Income due Nursing Facility will be sent by families.