# Application/Redetermination for Elderly and Disabled Programs Alabama Medicaid Agency

**Important:** Answer all questions on this form. **An original signature in ink is required.** You may have someone help you complete the application. If additional space is needed, please provide information on the "notes" page at the end of the application. Anyone who makes or causes to be made a false statement, misrepresentation or omission of a material fact in an application or for use in determining eligibility for Medicaid, commits a crime punishable under federal or state law or both.

Please print using dark ink. 1. I want to apply for Medicaid in the: (Check one) Hospital Name and Address of Hospital (Date of Admission) Name and Address of Nursing Home Nursing Home (Date of Admission) ICF/MR Program Name and Address of Intermediate Care Facility for the Mentally Retarded (Date of Admission) ☐ Home and Community Based Waiver Program SSI Related Programs (Retroactive, DAC, Widow/Widower, Continuous and Grandfathered Children) 2. Applicant: District Office Use Only Name: Middle/Maiden First Last Home Address: Street or 911 Address (Note: If you are now in a nursing home, your home address prior to admission to the nursing home should be given here.) District Office Stamp City Zip Code Medicare Number County of Residence: Telephone Number, include Area Code: Date of Birth: Social Security Number: Medicaid Number 3. Race: ☐ White ☐ Black ☐ American Indian ☐ Hispanic ☐ Asian ☐ Other 4. Sex: □ Female ☐ Male 5. Marital Status (Marriage Information): \_\_\_\_\_ (Date Married) 

I am Divorced \_\_\_\_\_\_ (Date Divorced) ☐ I am Married ☐ I am Single (Never Married) ☐ I am Separated \_\_\_\_\_\_ (Date Separated) ☐ I am Widowed \_\_\_\_\_ (Date Widowed) 6. Sponsor: (If the applicant is unable to complete the application or provide additional information, the Medicaid sponsor should be the person most familiar with the financial situation of the applicant and should complete page 10.) Relationship: \_\_\_\_\_ Home Phone: Office Phone:\_\_\_\_ Address: \_\_\_ City State Zip Form 204/205 (Revised 09/2006) Alabama Medicaid Agency

7. Spouse Identification (must be completed if you are married or separated):	11. Residency Information:  Are you a United States Citizen? ☐ Yes ☐ No  If not, when did you enter the United States?
Name (First, Middle, Last)	How long have you lived in Alabama?
Address (Street or Box Number)	Do you plan to remain in Alabama? Yes No Where were you living prior to entering the medical institution
(City, State, Zip Code)	that you are now in?
Telephone Number (Area Code & Number	City County State
Date of Birth Social Security Number	12. Veteran's Status:  Are you a Veteran? ☐ Yes ☐ No
8. Former Spouse Identification (must be completed if you are widowed or divorced) (For all previous marriages, list most recent first.):  1. Former Spouse's Name:  Social Security Number	Are you a dependent of a veteran?
Date Marriage Began Ended	First Middle Last
Reason: Death Divorce Other	
2. Former Spouse's Name:	Claim Number  Have you applied for Veteran's benefits under the new Veterans
Social Security Number	& Survivor's Improvement Act?   Yes   No  If no, you must apply and send verification.
Date Marriage Began Ended	12 Supplemental Security Income (SSI)
Reason: Death Divorce Other  9. Living Arrangements:	13. Supplemental Security Income (SSI):  Have you ever applied for or received SSI? ☐ Yes ☐ No  If yes, when? (month/year)
Check the item which describes your current living arrangement.  ☐ In your own home with husband or wife (A)  ☐ In your own home alone (A)	14. Medical Information:  Did you have medical expenses in any of the three (3) months prior to application? ☐ Yes ☐ No
<ul> <li>☐ In your parent's household (C)</li> <li>☐ In a rented house, apartment, or room (A)</li> <li>Amount of Rent \$</li></ul>	15. Legal Status: Has the applicant appointed a power of attorney or has a guardian or conservator been appointed?  Yes No If yes, provide a copy and complete the following:  Name Address City, State, Zip Code
10. Family Size:  List names of anyone, excluding your spouse, living in your hon Name  Age Relations	ship Income Source Monthly Amount

### 16. Gross Unearned Income

Gross Income: (This means "money coming in" before anything is taken out). Answer the following. Do you or your spouse have "money coming in" from any of the sources listed below? ☐ Yes ☐ No

If yes, fill in the claim number and gross amount. (A copy of most recent check stub or other verification must be provided.)

NOTE: If you are applying on behalf of a child, each parent must also answer these questions.

NOTE: If you are applying on behalf of an adult, the spouse must also answer these questions.

TVOTE. If you are applying on behalf		Applicant	Spouse (or Parent)	Other (or Parent)	How Often Received?
Type of Income	Claim Number	Gross Amount	Gross Amount	Gross Amount	(Quarterly, Annually, etc.)
Social Security					, , , , , , , , , , , , , , , , , , , ,
(include Medicare Premiums)					
2. SSI (Gold Check)					
3. Public Assistance (Welfare)					
Railroad Retirement					
5. Veterans Benefits, Pensions,					
Compensation or Insurance					
6. Federal Civil Service Annuity					
7. State Retirement/Pension					
8. Private Pension					
9. Miner's Benefits					
10. Black Lung Benefits					
11. Cash Contributions (from					
relatives, friends, others)					
12. Rental (land, buildings, or					
from roomer)					
13. Personal loans (relatives,					
friends, others)					
14. Unemployment Compensation					
15. Insurance Annuity or Proceeds					
16. Government Payments					
on land					
17. Coal, Oil, Gravel Rights and					
Timber Leases					
18. Royalties					
19. Court Ordered Support					
20. Interest on Savings					
21. Other: Specify					
22. Other: Specify					
23. Legal Settlements					
24. Sheltered Workshop Earnings					
25. Earned Income (See page 4)					
26. Self Employment (See page 4)					
27. Dividends					

17. Gross Earned Inc	ome (25)		
<b>Gross Income:</b> (This mean applicant should list the income)		nything is taken out) Both applicant AN	<b>D</b> spouse and parents of a child
	use now receive wages or have s s, etc.) in the past year, please cl	received any wages from earned income heck:   Yes   No	or self-employment (such as
If yes, list total wages (befo	ore anything was taken out of you	our wages) for the past three months.	
First Month Second Month Third Month	Applicant		Other (or Parent)
18. Self-Employment*	: (26)		
	ent currently self-employed? Employment (such as own your o	Yes No No wan business, farming, etc.)?	
*A copy of last year's	federal tax return must be	e provided (including Schedule "C	C" and/or "F").
19. Property			
Please complete all of the in your spouse have had an in		y you or your spouse own, or have owned	d in the past, or in which you or
		perty or do you have any interest (include, including your home?   Yes   No	
		ss of the property, include city, county a	
ii yes, where is the proper		ss of the property, include city, county a	nd state:
•	v? (Relative, spouse, renter, etc		
		if to return home? ☐ Yes ☐ No	
What is the next planned	use of this property?		
County Tax Assessor's Va	lue of the property:		<del> </del>
How much do you owe or	a the property?		
in any other property? $\Box$	Yes □ No	d any interest (including life estate, heir	
If yes, Where was the prop	perty located? County:	State:	
If you answered yes to be provided.	owning property now or	in the past 5 years, a copy of the	deed for the property must
If yes, Send ownership (title		No iler is located?	
in yes, who owns the idild	where the moone nome of train	ner is ioeneu:	

	. Liquid Assets counts (including checking, savings, certificat	te of der	oosit. IRAs):	
	es applicant, spouse or parent's name now appear on an	-		□ No
	s applicant, spouse or parent's name appeared on a bank		-	
	es applicant, spouse or parent's name now appear on a		•	• — —
	s applicant, spouse or parent's name appeared on a safe	-		
	ves to any of the above questions, complete the following	-		
1.	Name and address of Bank, Credit Union or Brokera	ge Firm:		
1,				
	Names on account: Account Number:			
	If closed, what was date closed?			rrent balance?
2.	Name and address of Bank, Credit Union or Brokera	ge Firm: _		
	Names on account:			
	Account Number:			
	If closed, what was date closed?		If open, what is cu	rrent balance? \$
3.	Name and address of Bank, Credit Union or Brokera	ge Firm:		
	Names on account:			
	Account Number:			
	If closed, what was date closed?			rrent balance? \$
4	Name and address of Bank Credit Union or Brakers	aa Firm:		
4.	Name and address of Bank, Credit Union or Brokera			
	Names on account:			
	Account Number:			rrent balance? \$
(B	ank statements and/or cancelled or imaged checks may		_	Trent balance: \$
(2)	and or cancelled or imaged elected into	be reques	acu.)	
Do	you (either alone, with your spouse, or with any other p	erson) nov	v have or have had:	
1.	An annuity or similar financial instrument:		Applicant	Spouse
	(Please describe separately under "Remarks"			
_	and provide current market value.)	\$		<b>\$</b>
2.	Stocks and bonds (Please list separately under			
	"Remarks" and provide current market value	¢		e.
3.	for each. Copies required). Enter total value here: Patient account in institution			
3. 4.	Cash not in bank			
4. 5.	Trust or special funds			
5. 6.	Money owed to you (including mortgages and	Φ		Φ
٠,	notes in which you have an interest). List			
	persons and amounts in "Remarks."	\$		<b>\$</b>
7.	U.S. Government Savings Bonds (Copies required)	\$		<u> </u>
D,	omorks.			
1/(	emarks:			
_				
_				

20. Liquid Assets (cor	ntinued)			
_	leases, mineral rights, timber	A	pplicant	Spouse
0	to real business property. under "Remarks" below.)			
Enter total value here:		\$		\$
9. Other (Give details un				\$ \$
(	,	-		,
Remarks:				
Personal Property:				
	of things you own that are not	t real property or	liquid assets. Cars, bo	oats, tools, and equipment,
	llections, are examples of perso			111
Do you or your spouse har	ving sections and include your	estimate of how r	nuch you would get if	you sold it now.
1. An Automobile?				
Make	Model	Value	How is it used?	How much do you owe?
_		¢		
a		\$		
b		\$		
2. Tractor, Farm Machi	nery, Other Machinery and E	auinment? 🗆 Y	es 🗆 No	
Type of Equipme			Value	How much do you owe?
			ø	6
a			\$	\$
b			\$	
3. Other Personal Prop	perty (such as antiques, hobby	collections, etc.)	□ Yes □ No	
-	d may be required.			
			·-	
21. Transfer of Reso		-:64l		h a a t a a a a a tha a a a a a a a a a
	past 36 months (60 mont			boat or other resource to an annuity)? $\square$ Yes $\square$ No
any person within the	Tast to months (or mont	IIS II assets pla	The second of th	
Item Sold or	Person to Whom it	I	ate Given	Amount Received
Given Away	was Sold or Given		or Sold	or Given
	1		l	

22. Buria	al or Life Insurance		
Do you or y	your spouse have any life insura	nnce policies? 🗌 Yes 📋	No (If yes, copy of face value page required.)
If yes, 1.	Name of Company		
	Address (if known)		
	Policy Number		
	Person insured  Applicant		Death Benefit/Face Value of Policy \$
2.	Name of Company		
	Policy Number		
			Death Benefit/Face Value of Policy \$
3.	Name of Company	- ·	
	Policy Number		
			Death Benefit/Face Value of Policy \$
4.			
	Policy Number		
•	Person insured  Applicant		Death Benefit/Face Value of Policy \$
	r orson misured 🗀 rippineum	Броиз <b>с</b>	Bedin Benefit dee value of Foney \$
Do you or y	your spouse have any burial/vau	ılt insurance policies?	Yes □ No
	y of face value page required.)		
, ,			
	Policy Number		
	Person insured  Applicant		Death Benefit/Face Value of Policy \$
2.			
	Policy Number	<del></del>	
•	Person insured  Applicant		Death Benefit/Face Value of Policy \$
3.	Name of Company	-	
<i>J</i> .	Address (if known)		
	Policy Number		
	Person insured  Applicant		Death Benefit/Face Value of Policy \$
	reison insured [ Applicant	□ Spouse	Death Benefit race value of Folicy \$

23. Medical Insurance	
Do you have Medicare (Social Security Health Insurance)?   Yes	□ No
If yes, what is your Medicare Number?	
Are you enrolled in a Medicare Part D drug plan to cover the costs of If yes, how much do you pay for the drug plan premium each month	
What is the name of the drug plan you are enrolled in?	
Do you have Long Term Care Insurance?	Name of Company Address (if known) Type of Policy Policy Number Other How much is the premium? How often do you pay?
and that you paid it with your money.	
24. Other Burial Fund  Do you or your spouse have a Pre-need contract with a funeral hom  [If yes, copy of contract(s) required.]  If yes, Name of Funeral Home  Address  Amount \$  Do you or your spouse have anything else to pay burial expenses? (if yes, what?)	For example, savings account, cash, CD, etc.)   Yes  No
Notes	
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#### RELEASE OF INFORMATION

\* I hereby authorize and give my consent for the Alabama Medicaid Agency to obtain information from any source for the purpose of determining my eligibility for Medicaid benefits. I authorize this release form to be in effect for as long as I am on Medicaid regardless of the date that it is signed. I further authorize copies of this document to be used in place of the original. I give my consent for the release of information for those purposes directly related to the administration of the Medicaid program. These purposes include, but are not limited to, establishing eligibility for benefits, determination of the amount of medical assistance received, the provision of services, and investigation of program violations.

#### AFFIRMATION AND AGREEMENT

- \* I understand that as a condition of receiving state medical assistance I shall disclose a description of any interest I or my spouse have in an annuity (or similar financial instrument), regardless of whether the annuity is irrevocable or is treated as an asset.
- \* I understand that as a condition of receiving state medical assistance the Alabama Medicaid Agency will become a remainder beneficiary on any annuity that I or my spouse purchased or on which we performed certain transactions on or after February 8, 2006.
- \* I certify under penalty of perjury that I am a citizen or national of the United States, or in satisfactory immigration status.
- \* I give permission to the Alabama Medicaid Agency to use my social security number to get information about my resources and income from banks, financial institutions, employers, and other county, state and federal agencies, and/or to see if I qualify for assistance or to see if I have insurance.
- \* I understand that if this application or other information shows that I may be eligible for payments or benefits from other sources, I am required to apply for them.
- \* I understand that if I am awarded nursing home benefits that part or all of my income must be applied to the nursing home bill as directed by the Alabama Medicaid Agency.
- \* I understand that my case is subject to review by State and Federal Quality Control and that I must cooperate in completing the application process or in any subsequent reviews of my eligibility, including reviews resulting from reported changes, recertification, or as a part of a State or Federal Quality Control Review.
- \* If I am approved for Medicaid, I assign all insurance and medical support benefits to Medicaid. If Medicaid pays my bills, then my insurance or other benefits (such as lawsuit settlements) must be used to pay Medicaid back. I agree to help and cooperate with Medicaid in identifying and collecting this money, or I may lose my Medicaid benefits. I give permission for my insurance company, employer, and others to give needed information to Medicaid in order to administer the Medicaid program.
- \* I understand that resources that have been sold, transferred, disposed of, or given away within the past 36 months (60 months for transfers to trusts) from the month of application, may affect eligibility for Medicaid in a medical institution or a Home and Community Based Waiver Program.

#### RESPONSIBILITIES

\* I agree to notify the Medicaid District Office within ten (10) days, if there is a change in my address, living arrangements, family size, income or resources. I agree to notify the district office if I return to work, am discharged from the nursing home, hospital or move from one to the other. I also agree to report any improvement in my medical condition if I am receiving Medicaid benefits because I am blind or disabled and I am not yet 65 years of age.

#### ESTATE RECOVERY

I understand that my estate may be subject to recovery of any funds expended by Medicaid pursuant to this application and/or redetermination. My sponsor, relative, or other person who files my estate <u>MUST</u> notify Alabama Medicaid at ATTN: Estate Administration, P.O. Box 5624, Montgomery, Alabama 36103-5624.

#### FALSE STATEMENTS

I know that anyone who makes or causes to be made a false statement, misrepresentation or omission of a material fact in an application or for use in determining eligibility for Medicaid commits a crime punishable under Federal or State law or both.
I affirm under penalty of perjury that all information I give in this document or in support of it is true.

Does the applicant and/or sponsor/repres Responsibilities, Estate Recovery, and Fa  Yes No	-		_	es?
Signature of Applicant	Date	Signature of Spouse	Date	
Signature of Parent or Sponsor	Date			
Witness' Signature	Date	Witness' Signature	Date	
(Witnesses are required only if the appli	cant signs with an "X")		Pa	age 9

APPOINTMENT OF REPRI	ESENTATIVE			
I hereby appoint:  as my legal representative to act in Title XIX of the Social Security Acrepresentative on my behalf. This Medicaid matters involving me, in accepting and giving notice in compresenting and eliciting evidence. Medicaid Agency in writing that the	ct from the Alabama Medi appointment authorizes in cluding, but not limited to nection with eligibility de This appointment shall re	icaid Agency, hereby ratifying a ny said representative to fully a no, making applications, reapplications, reapplications and Fair Hearings demain in full force and effect un	claim for Medicaic and confirming the ct in my stead in c cations and claims s, requesting infor	e acts of my said connection with all s of all kinds, mation, and
Done this the	day of		, 20	·
		WITNESSES:		
(Signature of Medicaid Claimant)				
(Social Security Number)				
If claimant cannot sign his/her nar The mark may be labeled. Example			y two adults.	
Why can't claimant sign'	estions below: to claimant??	ere is no one legally designated		
If claimant has a legally appointed for Medicaid purposes, claimant's of the form only and attach to this Conservatorship/Guardianship or l	signature on this form is a form a copy of evidence of	not required. Representative shift legal authority to act on claim	ould sign the Rep	resentative portion
ACCEPTANCE OF APPOINTM	IENT			
I hereby accept the foregoing appo Alabama Medicaid Agency and am representations and applications ma penalties for perjury and that false My relationship to the above is _	not otherwise disqualified ade by me on behalf of the statements may subject me	I from acting as an appointed re claimant are made under an affi to penalties or fraud.	presentative. I ack irmation which sub	knowledge that bjects me to
Done this the	day of		, 20	·
		WITNESSES:		
(Signature of Sponsor/Representat	ive)	_		
(Address)		_		
(City, State)		_		
(Telephone Number)		_		Page 10

## **Notice to Applicants and Sponsors**

Federal and state laws provide both criminal and civil penalties for false statements or material omissions in an application for Medicaid benefits or payments. Also, any application found to contain material misstatements or omissions will be denied.

The following statutes are excerpts from the Code of Alabama pertaining to the Medicaid program:

- § 22-1-11. Making false statement or representation of material fact in claim or application for payments on medical benefits from medicaid agency generally; kickbacks, bribes, etc.; exceptions; multiple offenses.
- (a) Any person who, with intent to defraud or deceive, makes, or causes to be made or assists in the preparation of any false statement representation or omission of a material fact in any claim or application for any payment, regardless of amount, from the medicaid agency, knowing the same to be false; or with intent to defraud or deceive, makes, or causes to be made, or assists in the preparation of any false statement, representation or omission of a material fact in any claim or application for medical benefits from the medicaid agency, knowing the same to be false; shall be guilty of a felony and upon conviction thereof shall be fined not more than \$10,000.00 or imprisoned for not less than one nor more than five years, or both.

\* \* \*

- (e) Any two or more offenses in violation of this section may be charged in the same indictment in separate counts for each offense and such offense shall be tried together, with separate sentences being imposed for each offense of which defendant is found guilty. (Acts 1980, No. 80-539, p. 837, Sections 1-5.)
- \$ 22-6-8, Revocation of eligibility of recipient upon determination of abuse, fraud, or misuse of benefits; when eligibility may be restored.
- (a) Upon determination by a utilization review committee of the designated state medicaid agency that a medicaid recipient has abused, defrauded, or misused the benefits of the program said recipient shall immediately become ineligible for medicaid benefits.
- (b) Medicaid recipients whose eligibility has been revoked due to abuse, fraud or other deliberate misuse of the program shall not be deemed eligible for future medicaid services for a period of not less than one year and until full restitution has been made to the designated state medicaid agency.
- (c) The provisions of this section shall not be effective if they are found by a court of competent jurisdiction to contravene federal laws or federal regulations applicable to the medicaid program. (Acts 1980, No. 80-127, p.190.)

# **Medicaid District Offices**

Address	Telephone Number	Cou	Counties served		
Auburn-Opelika District Office 1716 Catherine Court, Suite 1-A Auburn, AL 36830-5788	1-800-362-1504 334-887-3840 (FAX)	Bullock Chambers Clay Coosa	Lee Macon Randolph	Russell Talladega Tallapoosa	
Birmingham District Office 486 Palisades Blvd. Birmingham, AL 35209-5154	1-800-362-1504 205-414-9335 (FAX)	Jefferson	St. Clair		
Decatur District Office 2119 Westmeade Dr. SW., Suite 1 Decatur, AL 35603-1050	1-800-362-1504 256-353-1799 (FAX)	Cullman Jackson	Madison Morgan		
Dothan District Office 2652 Fortner Street, Suite 4 Dothan, AL 36305-3203	1-800-362-1504 334-794-3741 (FAX)	Barbour Coffee Conecuh	Covington Dale Geneva	Henry Houston	
Florence District Office 214 E. College Street Florence, AL 35630-5606	1-800-362-1504 256-740-0228 (FAX)	Colbert Franklin Lauderdale	Lawrence Limestone	Marion Winston	
Gadsden District Office 200 West Meighan Blvd., Suite D Gadsden, AL 35901-3200	1-800-362-1504 256-546-4973 (FAX)	Blount Calhoun Cherokee	Cleburne Dekalb Etowah	Marshall	
Mobile District Office 3280 Dauphin Street Suite B 100 B Mobile, AL 36606-4049	1-800-362-1504 251-471-6930 (FAX)	Baldwin Escambia	Mobile Washington		
Montgomery District Office 501 Dexter Avenue (P.O. Box 5624, Zip 36103-5624) Montgomery, AL 36104-3744	1-800-362-1504 334-242-3835 (FAX)	Autauga Crenshaw Elmore	Montgomery Pike		
Selma District Office 106 Executive Park Lane Selma, AL 36701-7734	1-800-362-1504 334-418-0036 (FAX)	Butler Chilton Choctaw Clarke	Dallas Lowndes Marengo	Monroe Perry Wilcox	
Tuscaloosa District Office 907 22 <sup>nd</sup> Avenue Tuscaloosa, AL 35401-5822	1-800-362-1504 205-345-9414 (FAX)	Bibb Fayette Greene Hale	Lamar Pickens Shelby	Sumter Tuscaloosa Walker	