



Pesky Problem in Medicaid Cases

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PROTECTING OUR CLIENTS AND THEIR LEGACY SINCE 1991

Providing Documents to HHS

- ❖ 1 - Identify the documents needed for each element of eligibility
 - ❖ Medicaid for the Elderly and People with Disabilities Handbook Appendix XVI, Documentation and Verification Guide
- ❖ 2 - Obtain the information from the client
- ❖ 3 - Provide the documentation to HHS in a clear and organized manner

Hidden Gems in Appendix XVI

- ❑ Do not leave blanks on application and recertification forms
- ❑ Know when you can use streamlined verification methods
- ❑ Give consideration to the timing of consistent income deposits
- ❑ Give bank statements for application month and 3 months prior
- ❑ For recertifications, verify assets as of the month the recertification is received by HHS, the two months prior to HHS' receipt of the recertification, or any month up until completed
- ❑ Check bank statements for drafts to life insurance companies
- ❑ For clients on hospice, Form 3071 Individual Election/Cancellation/Update form may be used to satisfy medical necessity requirement

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[Answer Bar: Elder Law and Medicaid Essentials](#)

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