

Financial Disclosure

Medicaid Application Status

_____ Approved Medicaid number: _____
_____ Pending County: _____
Date submitted: _____
Caseworker name: _____

Has an application ever been denied?) _____

Recipients of Medicaid are required to pay their "Net Available Monthly Income" or "NAMI" to Robinson Terrace as part of their Medicaid rate. To facilitate collections I hereby agree to have the Social Security portion of my "NAMI" forwarded to and payable to "Robinson Terrace". Any surplus over and above the "NAMI" shall be deposited into the Resident's personal account.
Initials: _____

Insurance company (circle all that apply)

Medicare A

Medicare B

Other insurance company:

Name and address/ phone number:

Policy #: _____

Income

Social Security	\$ _____ / month
Retirement Pension	\$ _____ / month
Veteran's Pension	\$ _____ / month
Railroad Pension	\$ _____ / month
Supplemental Security Income	\$ _____ / month
Annuities	\$ _____ / month
Other income	\$ _____ / month

TOTAL INCOME \$ _____ / MONTH

Checking Account:

Bank: _____

Balance: \$ _____ Joint Account? _____

Savings Account:

Bank: _____

Balance: \$ _____ Joint Account? _____

(List any additional accounts on a separate page)

CDs/Stocks/ Mutual funds/ life insurance/other holdings:

Bank/ Institution: _____

List Amounts below:

Own a home? _____ Value: _____

Is the home owned jointly? _____

Section 366.5 of the New York State Social Service Law, enacted in 1982, states that any transfer of assets or resources within a 60 month period prior to applying for Medicaid will be presumed to have been done for the purpose of qualifying for Medicaid, resulting in being ineligible for Medicaid assistance. Initials: _____

Have any assets been transferred in the last 60 months? _____

If yes, please describe:

Has a trust been established? _____ Date of trust? _____

If yes, please provide a copy.

To the best of my knowledge, all of the information provided herein is correct and valid. I understand that the information contained in this form will be shared with nursing homes in which I have an interest.

X _____

Signature of patient or representative

date

The information provided shall remain confidential and shall be made available only to authorized hospital and nursing home personnel involved in the placement process and to any governmental officials authorized access by law to such records.

The facilities having access to this information do so without regard to race, creed, color, age, sex, religion, national origin, sponsor, sexual preference, disability, or marital status; persons under 16 years of age are not eligible for admission consideration unless special approval has been received from the New York State Department of Health.

4/9/09