

Revenue Admission Checklist

Before admission to a PA Veterans Home, the following documents need to be submitted if they apply to the applicant. Please use this sheet as a checklist to assist the applicant.

Legal Documentation and IDs - Please provide copies of the following documents for the applicant.

- _____ DD-214 or equivalent military discharge record of veteran if service was prior to 1950
discharge must be Honorable or General Under Honorable Conditions
- _____ photo ID
- _____ birth certificate
- _____ marriage certificate if the applicant is the spouse of a veteran
- _____ Social Security card
- _____ spouse's full maiden name, date of birth, and Social Security number
- _____ mother's full maiden name and father's full name
- _____ car registration/s
- _____ living will/advanced directive
- _____ durable power of attorney or legal guardianship papers
- _____ court order/s for support
- _____ trust document/s that the applicant is named in

Income information - Please provide copies of the most recent documentation for veteran and spouse.

- _____ Social Security award letter
- _____ VA pension or VA compensation award letter
- _____ gross public and private pension income
- _____ interest income
- _____ dividend income
- _____ employment income
- _____ IRA, 401(k), annuity, etc. income
- _____ long-term care insurance income
- _____ workers' compensation income
- _____ rental income
- _____ farm income
- _____ court-ordered support payment/s received
- _____ reverse mortgage income
- _____ misc. income

Asset information - Please provide copies of the following documents for veteran and spouse.

- _____ current bank statement for all accounts
- _____ federal tax return - most recent
- _____ property deed/s
- _____ stocks and bonds
- _____ cash value of all whole life insurance policies
- _____ documentation of sale, transfer, or gifting of ownership of assets during the past five years

Insurance information - Please provide copies of the following documents for the applicant.

- _____ health insurance cards - front and back, including old and new Medicare cards
- _____ prescription insurance cards - front and back
- _____ health insurance premium invoice
- _____ long-term care insurance policy

Burial information - Please provide copies of the following information for the applicant.

- _____ burial reserve agreement, burial CD/irrevocable burial fund/life insurance policy if funeral home is the beneficiary
- _____ funeral home name and address
- _____ cemetery name and address

Liabilities - Please provide copies of the following information for the veteran and spouse.

- _____ mortgage payment statement on primary residence or rental agreement
- _____ homeowners' or renters' insurance premium statement
- _____ real estate taxes on primary residence
- _____ court-ordered support payment/s made
- _____ primary residence heating bill, electric bill, water bill
- _____ primary home and cell phone bills

FYI - the fact that a liability exists does not mean it will be granted as a deduction on the cost of care

Please note that a prorated payment will be due at the date of admission. The applicant will be informed of it beforehand.