

Revenue Admission Checklist

Before admission to a State 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.