

# Alabama Medicaid Agency



## Application/Redetermination for Elderly and Disabled Programs

**Instructions:** Read this application carefully and follow all instructions given throughout the form. Answer each question completely and accurately.

You may have someone help you complete the application.

1. Send verification of the gross (before taxes) amount of your monthly income.
2. Send a copy of your Social Security card.
3. If you have Medicare, send a copy of your Medicare card.
4. Sign the application.
5. Hit "Submit" at the end of the application to submit electronically.

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.

## **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:

S 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 benefit 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.)

S 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 Eligibility Policies and Procedures are in compliance with  
Civil Rights Act of 1964,  
Section 504 of the Rehabilitation Act of 1973, Federal Age Discrimination Act  
of 1975 and the Americans with Disabilities Act of 1990.





**11 Spouse Identification (Must be completed if you are married or separated.)**

Name: \_\_\_\_\_  
First Middle Last Suffix (Jr., Sr.)

Phone #: (\_\_\_\_) \_\_\_\_\_

Address: \_\_\_\_\_  
(Street or Box Number)

Date of Birth: \_\_\_\_\_

\_\_\_\_\_  
City State Zip Code County

SSN: \_\_\_\_\_

Email: \_\_\_\_\_

Spouse's Medicaid #: \_\_\_\_\_

**12 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: \_\_\_\_\_ SS#: \_\_\_\_\_  
 Date Marriage Began: \_\_\_\_\_ Ended: \_\_\_\_\_ Reason:  Death  Divorce  Other

2. Former Spouse's Name: \_\_\_\_\_ SS#: \_\_\_\_\_  
 Date Marriage Began: \_\_\_\_\_ Ended: \_\_\_\_\_ Reason:  Death  Divorce  Other

**13 Veteran's Status**

Are you a Veteran?  Yes  No

Are you a dependent of a veteran?  Yes  No

If yes to either of the questions above, complete the following:

Veteran's Name: \_\_\_\_\_  
First Middle Last Suffix (Jr., Sr.)

SSN: \_\_\_\_\_ VA Claim #: \_\_\_\_\_

Relationship to Veteran \_\_\_\_\_

Have you applied for Veteran's benefits under the new Veterans & Survivor's Improvement Act?  Yes  No If yes, in which county did you apply? \_\_\_\_\_

If no, you must apply.

**14 Household Members List names of anyone under the age of 19, living in your household.**

Name	Age	Relationship	Income Source	Monthly Amount
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____

**15 Income Gross Income (This means "money coming in" before anything is taken out.)**

**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

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.

Type of Income (Copy of most recent check stub or other form of verification required.)	Claim Number	Applicant Gross Amount	Spouse (or Parent) Gross Amount	Other (or Parent) Gross Amount	How Often Received? (Quarterly, Annually, etc.)
1. Social Security (include Medicare Premiums)					
2. SSI (Gold Check)					
3. Public Assistance (Welfare)					
4. 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. Work Income					
(A copy of most recent check stub or some other form of verification must be provided.)					
26. Self Employment					
(A copy of last year's federal tax return must be provided (including Schedule "C" and/or "F").					
27. Dividends					

**16 Property**

Please complete all of the information concerning property you or your spouse own, or have owned in the past 5 years, or in which you or your spouse have had an interest.

If additional space is needed, please report on the last page of this application or attach a separate sheet of paper

Do you or your spouse now own or are you buying any property or do you have any interest (including life estate, heir property, joint ownership, etc.) in land, buildings or other property, including your home?

Yes  No

If yes, who owns the property? \_\_\_\_\_

If yes, where is the property located? (List the full address of the property include city, county, and state)

Parcel 1: \_\_\_\_\_

Parcel 2: \_\_\_\_\_

Parcel 3: \_\_\_\_\_

Parcel 4: \_\_\_\_\_

Parcel 5: \_\_\_\_\_

Does anyone live there now?  Yes  No

Which Parcel? \_\_\_\_\_

If yes, what is the persons' name and relationship to the applicant? \_\_\_\_\_

If you are temporarily away from your home, do you intend to return home and live on this property in the future? Yes  No

Do you owe money on the property? Yes  No

If yes, send amortization schedule showing payment schedule and amount owed.

Do you have a reverse mortgage? Yes  No

If yes, send verification of the payments you have received and the remaining balance.

Have you or your spouse owned or had any interest in any other property (including life estate, heir property, joint ownership, etc.) within 5 years of the month in which you filed a Medicaid application? Yes  No

If yes, where was the property located? County: \_\_\_\_\_ State: \_\_\_\_\_

When did you sign a deed disposing of this property? \_\_\_\_\_

If you answered yes to owning property now or in the past 5 years, send copies of the deed(s) showing you purchased the property. If sold, copies of the deed(s) showing you transferred the property and a copy of the settlement statement.

Do you or your spouse own a mobile home? Yes  No

If yes, send ownership (title) verification. If yes, who owns the land where the mobile home or trailer is located? \_\_\_\_\_

**17 Resources Accounts (including checking, savings, certificate of deposit, IRAs)**

Does applicant, spouse or parent's name now appear on an account of any kind?

Yes  No

Has applicant, spouse or parent's name appeared on a bank account of any kind in the last 5 years? Yes  No

Does applicant, spouse or parent's name now appear on a safe deposit box? Yes  No

Has applicant, spouse or parent's name appeared on a safe deposit box of any kind in the last 5 years?

Yes  No

If yes to any of the above questions, complete the following:

1. **Name and address of Bank, Credit Union, or Brokerage Firm:** \_\_\_\_\_

Names on account: \_\_\_\_\_

Account Number: \_\_\_\_\_ Type of account: \_\_\_\_\_

If closed, what was date closed? \_\_\_\_\_ If open, what is current balance? \_\_\_\_\_

2. **Name and address of Bank, Credit Union, or Brokerage Firm:** \_\_\_\_\_

Names on account: \_\_\_\_\_

Account Number: \_\_\_\_\_ Type of account: \_\_\_\_\_

If closed, what was date closed? \_\_\_\_\_ If open, what is current balance? \_\_\_\_\_

3. **Name and address of Bank, Credit Union, or Brokerage Firm:** \_\_\_\_\_

Names on account: \_\_\_\_\_

Account Number: \_\_\_\_\_ Type of account: \_\_\_\_\_

If closed, what was date closed? \_\_\_\_\_ If open, what is current balance? \_\_\_\_\_

4. **Name and address of Bank, Credit Union, or Brokerage Firm:** \_\_\_\_\_

Names on account: \_\_\_\_\_

Account Number: \_\_\_\_\_ Type of account: \_\_\_\_\_

If closed, what was date closed? \_\_\_\_\_ If open, what is current balance? \_\_\_\_\_

**Bank statements and/or cancelled or imaged checks may be requested.**

**Do you (either alone, with your spouse, or with any other person) now have or have had in the past 5 years:**

1. An annuity or similar financial instrument:

Applicant Spouse (Please describe separately under "Remarks" and provide current market value. \$ \_\_\_\_\_

Remarks: \_\_\_\_\_

2. Stocks and bonds (Please list separately under "Remarks" and provide current market value for each. Copies required). Enter total value here: \$ \_\_\_\_\_ \$ \_\_\_\_\_

Remarks: \_\_\_\_\_

3. Cash not in bank \$ \_\_\_\_\_ \$ \_\_\_\_\_



**17 Resources (continued)**

Applicant

Spouse

4. Trust or special funds \$ \_\_\_\_\_ \$ \_\_\_\_\_

5. Money owed to you (including mortgages and notes in which you have an interest).

List persons and amounts in "Remarks." \$ \_\_\_\_\_ \$ \_\_\_\_\_

Remarks: \_\_\_\_\_

6. U.S. Government Savings Bonds (Copies required) \$ \_\_\_\_\_ \$ \_\_\_\_\_

7. Ownership interest in leases, mineral rights, timber rights or other rights to real business property . (For mineral rights, provide copy of Lease Agreement and verify income received.)

(Please list separately under "Remarks" below.)

Enter total value here: \$ \_\_\_\_\_ \$ \_\_\_\_\_

Remarks: \_\_\_\_\_

8. Other (Give details under "Remarks") \$ \_\_\_\_\_ \$ \_\_\_\_\_

Remarks: \_\_\_\_\_

**If you have additional resources, please report on the last page of the application or on a separate sheet of paper and attach to application.**

**Transfer of Resources** Has the applicant or spouse sold or given as a gift, any cash, property, vehicle, boat or other resource to any person within the past 5 years? Yes  No

Item Sold or Given Away	Person to Whom it was Sold or Given	Date Given or Sold	Amount Received or Given

**Life Insurance**

**Do you or your spouse have any life insurance policies?**  Yes  No  
(If yes, copy of face value page is required.)

**1. Name of Company** \_\_\_\_\_

Address (if known) \_\_\_\_\_

Policy Number \_\_\_\_\_

Person insured Applicant  Spouse  Death Benefit/Face Value of Policy \$ \_\_\_\_\_

**2. Name of Company** \_\_\_\_\_

Address (if known) \_\_\_\_\_

Policy Number \_\_\_\_\_

Person insured Applicant  Spouse  Death Benefit/Face Value of Policy \$ \_\_\_\_\_

**3. Name of Company** \_\_\_\_\_

Address (if known) \_\_\_\_\_

Policy Number \_\_\_\_\_

Person insured Applicant  Spouse  Death Benefit/Face Value of Policy \$ \_\_\_\_\_

**4. Name of Company** \_\_\_\_\_

Address (if known) \_\_\_\_\_

Policy Number \_\_\_\_\_

Person insured Applicant  Spouse  Death Benefit/Face Value of Policy \$ \_\_\_\_\_

**5. Name of Company** \_\_\_\_\_

Address (if known) \_\_\_\_\_

Policy Number \_\_\_\_\_

Person insured Applicant  Spouse  Death Benefit/Face Value of Policy \$ \_\_\_\_\_

**6. Name of Company** \_\_\_\_\_

Address (if known) \_\_\_\_\_

Policy Number \_\_\_\_\_

Person insured Applicant  Spouse  Death Benefit/Face Value of Policy \$ \_\_\_\_\_

**20 Burial or Vault Insurance**      **Do you or your spouse have any burial or vault insurance policies?**  Yes  No (If yes, copy of face value page is required.)

1. **Name of Company** \_\_\_\_\_

Address (if known) \_\_\_\_\_

Policy Number \_\_\_\_\_

Person insured  Applicant  Spouse      Death Benefit/Face Value of Policy \$ \_\_\_\_\_

2. **Name of Company** \_\_\_\_\_

Address (if known) \_\_\_\_\_

Policy Number \_\_\_\_\_

Person insured  Applicant  Spouse      Death Benefit/Face Value of Policy \$ \_\_\_\_\_

3. **Name of Company** \_\_\_\_\_

Address (if known) \_\_\_\_\_

Policy Number \_\_\_\_\_

Person insured  Applicant  Spouse      Death Benefit/Face Value of Policy \$ \_\_\_\_\_

**21 Other Burial Fund**      **Do you or your spouse have a Pre-need contract with a funeral home?**  Yes  No (If yes, copy of contract(s) is required.)

Name of Funeral Home \_\_\_\_\_

Address \_\_\_\_\_

Amount \$ \_\_\_\_\_

**Do you or your spouse have anything else to pay burial expenses?**

(For example, savings account, cash, CD, etc.)  Yes  No

If yes, What? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**22 Personal Property**

**Personal property consists of things you own that are not real property or liquid assets: cars, boats, tools, and equipment, furniture, antiques, and collections, are examples of personal property.**

Please complete the following sections and include your estimate of how much you would get if you sold it now.

**Do you or your spouse have:**

1. **An Automobile?**  Yes  No

Make	Model	Value	How is it used?	How much do you owe?
a. _____	_____	\$ _____	_____	_____
b. _____	_____	\$ _____	_____	_____
c. _____	_____	\$ _____	_____	_____
d. _____	_____	\$ _____	_____	_____
e. _____	_____	\$ _____	_____	_____
f. _____	_____	\$ _____	_____	_____
g. _____	_____	\$ _____	_____	_____
h. _____	_____	\$ _____	_____	_____

2. **Tractor, Farm Machinery, Other Machinery and Equipment?**  Yes  No

Type of Equipment	Year Purchased	Value	How much do you owe?
a. _____	_____	\$ _____	\$ _____
b. _____	_____	\$ _____	\$ _____

3. **Antiques, Hobby collections, etc.**  Yes  No

a. _____	Estimated value \$ _____
b. _____	Estimated value \$ _____

**Professional appraisal(s) may be required.**

**23 Medical Insurance**

1. Do you have any other health/accident/disability/hospital insurance?  Yes  No

Name of Company \_\_\_\_\_

Address (if known) \_\_\_\_\_

Type of Policy \_\_\_\_\_

Who pays the health insurance premium? Yourself  Other

How much is the premium? \_\_\_\_\_

How often do you pay? \_\_\_\_\_

Name of Company \_\_\_\_\_

Address (if known) \_\_\_\_\_

Type of Policy \_\_\_\_\_

Who pays the health insurance premium? Yourself  Other

How much is the premium? \_\_\_\_\_

How often do you pay? \_\_\_\_\_

2. Are you enrolled in a Medicare Part D drug plan to cover the costs of your medicines?

Yes  No

Name of Company \_\_\_\_\_

Policy # \_\_\_\_\_ Premium Amount \_\_\_\_\_

Provide copies of all health insurance cards, including Part D.

**To keep money to pay your health insurance premiums, you must provide proof of the premium amount and that you paid it with your money.**

3. Do you have Long Term Care Insurance?  Yes  No

If yes, provide a copy of the policy and verification from the company of the total amount of benefits that have been paid.

Plan Name \_\_\_\_\_

Contract # \_\_\_\_\_



**APPOINTMENT OF REPRESENTATIVE**

I hereby appoint: \_\_\_\_\_ (Sponsor's Name) as my legal representative to act in my stead and on my behalf to apply, reapply and make claim for Medicaid benefits under Title XIX of the Social Security Act from the Alabama Medicaid Agency, hereby ratifying and confirming the acts of my said representative on my behalf. This appointment authorizes my said representative to fully act in my stead in connection with all Medicaid matters involving me, including, but not limited to, making applications, reapplications and claims of all kinds, accepting and giving notice in connection with eligibility determinations and Fair Hearings, requesting information, and presenting and eliciting evidence. This appointment shall remain in full force and effect until I have notified the Alabama Medicaid Agency in writing that this authority has been withdrawn.

Done this the \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_\_.

**WITNESSES:**

\_\_\_\_\_  
(Signature of Medicaid Claimant)

\_\_\_\_\_  
(Social Security Number)

If claimant cannot sign his/her name but can make a mark; this is acceptable if witnessed by two adults. The mark may be labeled. Example:     X    (Her mark)    Jane Doe    .

If claimant cannot sign his/her name or make a mark and there is no one legally designated as guardian, conservator, etc., representative must answer the questions below:

What is your relationship to claimant? \_\_\_\_\_

Why can't claimant sign? \_\_\_\_\_

To what extent are you responsible for claimant? \_\_\_\_\_

If claimant has a legally appointed guardian, conservator or someone with durable power of attorney who will represent him/her for Medicaid purposes, claimant's signature on this form is not required. Representative should sign the Representative portion of the form only and attach to this form a copy of evidence of legal authority to act on claimant's behalf (Letter of Conservatorship/Guardianship or Durable Power of Attorney).

**ACCEPTANCE OF APPOINTMENT**

I hereby accept the foregoing appointment. I certify that I have not been suspended or prohibited from practice before the Alabama Medicaid Agency and am not otherwise disqualified from acting as an appointed representative. I acknowledge that representations and applications made by me on behalf of the claimant are made under an affirmation which subjects me to penalties for perjury and that false statements may subject me to penalties or fraud. As an Authorized Representative, I agree to the following:

- Maintain the confidentiality of any information regarding the Medicaid client provided by the Alabama Medicaid Agency,
- Comply with state and federal laws and regulations concerning the protection of Medicaid client confidentiality and avoiding conflicts of interest,
- Comply with federal safeguard provisions in regards to Medicaid client information, and,
- Comply with federal prohibitions against the reassignment of claims against the Medicaid client.

My relationship to the above is \_\_\_\_\_ (Attorney, relative, etc.)

Done this the \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_\_.

**WITNESSES:**

\_\_\_\_\_  
(Signature of Sponsor/Representative)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(City, State)

\_\_\_\_\_  
(Telephone Number)

