

ADMISSION QUESTIONNAIRE



DATE: _____

I. APPLICANT DEMOGRAPHICS:

- A Name of Applicant _____
- B Home Address _____
City _____ County _____ State _____ Zip _____
- C Home Phone _____ Cell _____ Work _____
Email address _____ Religion _____
- D Social Security # _____ Gender M F
- E Date of Birth _____ Place of Birth _____
- F U.S. Citizen Yes No If yes, is proof available? Yes No
- G Marital Status _____
If married, name and location of spouse _____

- H Applicant or Spouse Currently Employed Yes No
- I Location of Applicant _____
- J Previous Nursing Home stays Yes No
If yes, facility name and dates of stay _____

II. APPLICANT DEMOGRAPHICS:

The facility requests that to the greatest extent feasible, the individual named as the Financial/Designated Representative for the applicant to be an existing attorney-in-fact for the applicant, or be granted a Durable Power of Attorney by the applicant as soon as possible to ensure continuity of payment of all expenses incurred to the extent of the applicant's resources.

- A Financial / Designated Representative (manages finances for applicant)
Name _____ Relation _____
Address _____
City _____ State _____ Zip _____
Home Phone _____ Cell _____ Work _____
Email address _____
Bank POA: Yes No Durable POA: Yes No Conservator/Guardian: Yes No
(If yes, please provide proof document)
- B Other Contacts
Name _____ Relation _____
Address _____
City _____ State _____ Zip _____
Home Phone _____ Cell _____ Work _____
Email _____

III. INSURANCE COVERAGE:

- A Veteran Yes No Spouse Veteran Yes No
- B Medicare # _____
- C Medicaid CIN# _____ Effective Date _____
 If Medicaid Pending, Interview Date _____
- D Long-Term Care Insurance Yes No Provider _____
- E Other Medical Insurance (BC/BC, IHA, HCP, Univera, EPIC, No Fault)
 Provide copies of all Insurance, Medicare, Pharmacy & Social Security cards
- | Company / Insurer | ID # | Monthly Premium |
|-------------------|-------|-----------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
- F Medicare Part D Plan & ID _____

IV. STATEMENT OF INCOME:

	Applicant	Spouse
A Social Security	\$ _____	\$ _____
SSI	\$ _____	\$ _____
Retirement / Pension	\$ _____	\$ _____
Veteran's Pension	\$ _____	\$ _____
Rental Income	\$ _____	\$ _____
Other Income (Specify)	\$ _____	\$ _____

Consent to change of address for Monthly Income Yes No

V. ASSETS / RESOURCES:

- A Real Estate Yes No
 If yes, Location _____ Value \$ _____

 Location _____ Value \$ _____

- B Life Insurance Yes No If yes, Face Value \$ _____ Cash Value \$ _____
 Face Value \$ _____ Cash Value \$ _____
- C Prepaid Funeral Yes No Location _____
- D Trust Yes No If yes, Name _____ Date Established _____
- E Additional Assets / Resources - Applicant or Joint with Applicant -
 (Checking, Savings, CDs, stocks, bonds, annuities, money market, etc.)
- | Account Name | Type of Account | Balance |
|--------------|-----------------|---------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
- * Are any of the above annuitized? Yes No Total Balance \$ _____

VI. LIABILITIES:

- A Home Mortgage: Yes No If yes, amount owed \$ _____
- B Loans: Yes No If yes, amount owed \$ _____
- C Credit Cards: Yes No If yes, amount owed \$ _____
- D Other (home equity, etc): Yes No If yes, amount owed \$ _____

VII. DIVESTING:

- A Has applicant / financial representative transferred assets or property in the past 60 months to a life estate or to someone other than yourself?
 Yes No If yes, Value \$ _____ Date of Transfer _____
- B Has applicant given gifts of money in the last 60 months?
 Yes No If yes, Value \$ _____ Date of Gift _____
- C Has applicant issues any Promissory Notes?
 Yes No If yes, Value \$ _____ Date of Issue _____
- D Has applicant been part of a Personal Care Agreement?
 Yes No If yes, describe _____ Date of Agreement _____
- E Additional Financial Information _____

VIII. COUNSEL:

Are you currently working with an attorney or other firm for Estate Planning Medical Planning?

If yes, please list name of firm: _____

I, _____ the Resident and/or the Designated Representative, each separately and individually, warrant that the financial information submitted to the facility concerning the Resident's finances is true, accurate and complete in all material respects, and that there are no material omissions.

I/we acknowledge that the facility has relied and will continue to rely upon my/our truthful representation of all the Resident's known income, assets, resources and liabilities, as well as my/our full disclosure of any transfers of income, and that my/our misrepresentation or failure to provide full disclosure may result in an interruption in payment or qualification for benefits for payment of expenses incurred by the Resident.

The Resident and/or Designated Representative assure payment of all expenses incurred to the extent of the applicant's resources.

REPRESENTATIONS, WARRANTIES AND INDEMNIFICATION AGREEMENT

1. Upon satisfactory review of the Questionnaire, including the representations and warranties made herein, the facility will consider the Resident for admission.

2. The Resident and Representative each acknowledge the facility's reliance on the statements made by them in the Admission Questionnaire and the promises made herein and agree to indemnify and hold the facility harmless from any and all liability, loss, expense, and/or damage which the facility may incur by reason of any misrepresentation contained in either the document or their noncompliance with the document.

3. The Resident and Representative represent and warrant that the Resident's assets are fully and accurately disclosed on the Questionnaire and that there have been no transfers of the Resident's ownership interest in any assets or resources within the past 60 months for which fair payment has not been received other than those listed in section VII.

4. The Resident and Representative agree that neither of them has previously done anything nor will either of them at any time hereafter do anything that would cause the Resident to become ineligible or disqualified for Medicaid for any period of time whether by reason of having transferred the Resident's present or future acquired assets without receiving fair payment or value in exchange for such transfer or otherwise.

5. If the Resident is the owner of a residence, the Resident and Representative represent and warrant that if and when the Resident no longer intends to return to such residence, such residence will be promptly sold for fair value and the proceeds used to discharge Resident's obligations to the facility if and when other resources are exhausted. Prior to exhausting Resident's other assets, they will list the residence for sale (with an M-L broker) for its then fair market value and diligently pursue the closing of a sale of the residence. The proceeds of sale will be held and used solely for discharging Resident's legal obligations, including the obligations to the facility.

6. The Resident and Representative agree that prior to exhausting the Resident's assets and resources, they will make timely application for Medicaid. The application shall be made in such manner and at such time that the Resident will be able to pay his/her obligations to the facility by means of the Resident's assets and resources and/or medical assistance provided by the State of New York or other government agency.

7. If the Resident is denied timely Medicaid coverage due to the willful or negligent failure of Resident and/or Representative to abide by this Agreement, they agree to indemnify and hold the facility harmless of and from any and all loss or damage occasioned by any misrepresentation or failure to qualify for Medicaid and they each agree to pay and reimburse the facility unconditionally all amounts that the facility would have received had a timely Medicaid pick-up date occurred.

8. The liability of the Resident and the Representative for all damages incurred by the facility as a result of the breach by either of them of any of the covenants and representations made herein will be joint and several. **Nothing herein, however, shall be construed to be a personal guaranty by the Representative of the obligations of the Resident to the facility for the room, board and/or care provided to Resident at the facility except to the extent that such obligation arises as a result of a breach of the covenants made herein.**

I have reviewed the information contained herein, and represent that it is factually true, accurate and complete. I understand that the facility utilizes this information in the admissions decision process. The above terms and conditions will become effective and be binding upon and enforceable against the Resident and the Representative upon the facility's admission of the Resident pursuant to this Questionnaire, the terms and provisions of which are hereby agreed to the _____ day of _____, 20__ by

_____ AND (Please Print) _____ ("Resident")
(Name of facility)

and (Please Print) _____ ("Representative").

Applicant's/Resident's Signature

Street

City, State, Zip Code

Representative's Signature

Street

City, State, Zip Code

Approved and Accepted: _____