Transfer of Asset Required Information

The following information is necessary in order for the medical review team to review Transfer of Assets requests:

Affidavit from transferee:

(1) Did you live with the person during the last two years without interruption?

(2) Did you work? How many hours/days?

(3) Who was home with this person?

(4) What activities of Daily Living was he/she capable of doing? If none, who provided help? Was a Home Care Agency involved? Explain:

Medical Documentation

(1) Provide office notes from doctors, test results, hospital discharge summaries for the two years prior to institutionalization.

(2) Physician letter stating that the care given by the transferee prevented institutionalization for at least two years.