



Medical Assistance Long-Term Care Facility Application Process and Pending Documentation Guide

This resource is a general guide to help understand the Medical Assistance (MA) Long-Term Care (LTC) facility application process and the information the Department of Human Services (Department) may require to determine eligibility for MA LTC facility services. This form does not need to be submitted with the Application for Benefits. More information about MA LTC eligibility requirements and the application process is available at: <http://services.dpw.state.pa.us/oimpolicymanuals/ltc/index.htm>.

What is the MA LTC facility application process?

The MA LTC facility application process begins when an Application for Benefits is received in the County Assistance Office (CAO). Applicants or anyone representing them can submit an application several ways:

- Online at www.dhs.pa.gov/COMPASS.
- Over the phone by calling the Consumer Service Center at 1-866-550-4355, or
- Paper application submitted to the CAO by mail or drop-off.

Applicants may need to provide documentation to verify information stated on the application, which can be submitted with the application. See the included “General Pending Items List” for information that may need to be provided. It is encouraged to submit applications as early and completely as possible, including available documentation. Once the application is received, the CAO will review the application and any submitted documents. They will send the applicant and the applicant’s representative a pending verification list to request the specific documentation required to determine eligibility and a due date for that information to be returned. If more time is needed to provide the requested documentation, the applicant or the applicant’s representative should call the Customer Service Center at 1-877-395-8930 (statewide) or 1-215-560-7226 (for Philadelphia residents) before the due date to request an extension.

What are the time frames for applying for MA LTC facility services?

The application should be submitted as soon as possible after payment of MA LTC services is needed to ensure the applicant can be authorized effective the date coverage is requested. The CAO has 30 days to process an application. An additional 15 days to process the application can be granted if an extension is requested to provide extra time to gather and submit documentation. See the LTC Handbook for more information about retroactive coverage and application submission time frames by visiting: <http://services.dpw.state.pa.us/oimpolicymanuals/ltc/index.htm>.

How will the applicant know whether they are eligible and, if eligible, when eligibility begins?

The CAO will send a notice of eligibility or ineligibility once the application is processed. If determined eligible, the notice will include the date payment of MA LTC facility services is effective. If determined not eligible, the notice will provide the reason for ineligibility.

What are the next steps when an applicant is determined not eligible?

If determined not eligible, the applicant or the applicant's representative has multiple options:

- Request Reconsideration. The applicant has the right to request a reconsideration (re-evaluation) of the application. The applicant has 60 days from the date the MA LTC facility application was rejected to contact the CAO to request reconsideration. If the application was rejected for failure to provide documentation requested by the CAO, and all documentation is submitted within 60 days, the application will be reviewed again.
- Appeal. The applicant has the right to appeal the Department's decision. The applicant has 30 days from the date on the notice of ineligibility to complete and submit the appeal request that is provided with the notice.
- Apply for an Undue Hardship Waiver. This option only applies to applicants determined not eligible for payment of LTC facility services because they transferred or gave away resources without receiving fair consideration. The "Application for Undue Hardship Waiver" and the "Explanation of the Effect of Transfers of Assets on Eligibility for Payment of Long-Term Care Services" form are included with the ineligibility notice when this is applicable. The applicant or representative has 30 days from the mail date on the ineligibility notice to submit the Application for an Undue Hardship Waiver.

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The CAO will review the information on the application and compare it to the information available in any previous case record in the eligibility system, any verifications submitted with the application, and information available through electronic data sources to determine if additional information is needed to process the application. If the review determines more verification is needed, the CAO will provide a pending verification list with a due date to provide the needed information. Below is a general list of information the CAO may need to process the application for payment of LTC facility services. This list is not all-inclusive as the circumstances for each applicant may vary. Items relevant to the applicant that are readily available upon submission of the application should be provided at the time of the application, but the pending verification list provided by the CAO serves as the official request from the Department for additional information needed to process the application.

*Notes column is available to use at the discretion of the person reviewing or using this form to aid in the application process.

| General Pending Items List | Additional Information | *Notes |
|---|---|--------|
| 1. Completed and signed Medical Assistance (Medicaid) Financial Eligibility Application for Long Term Care, Supports and Services (PA 600L). | A paper PA 600L may be submitted to the CAO or the applicant/ applicant's representative may apply online at www.dhs.pa.gov/COMPASS or by calling the Consumer Service Center at 1-866-550-4355. | |
| 2. Medical Evaluation Form (MA 51) submitted by Aging Well or the Department's designee. | The MA 51 is provided directly to the CAO by the LTC facility or the agency that assesses the applicant's functional eligibility. | |
| 3. Long Term Care Admission and Discharge Transmittal (MA 103) completed and submitted by the LTC facility. | The MA 103 is provided directly to the CAO by the LTC facility. | |
| 4. Resource Assessment Form (PA 1572) if the applicant is married (including separated) and a Resource Assessment has not already been completed. | A PA 1572 is needed for all married and/or separated applicants. The Resource Assessment form is included in the Admissions Notice Packet (MA 401) provided to all individuals upon admission to a LTC facility. If a married or separated applicant does not have a copy of the Resource Assessment, one will be provided by the CAO after the paper PA 600L, or online application is received. | |
| 5. Power of Attorney or Guardianship document. | | |

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| 6. Divorce decree if the applicant has been divorced within the last five years. | | |
| 7. If not a United States (U.S.) citizen, verification of Alien Registration Number and Immigration and Naturalization Services or U.S. Citizenship and Immigration Services documents. | | |
| 8. Deed to residential property owned by the applicant and/or spouse. | | |
| 9. Deed to non-residential property (rentals, condo, time share, etc.) owned by the applicant and/or spouse. | | |
| 10. Burial account/agreement (irrevocable and revocable) owned by the applicant and/or spouse to include statement of irrevocability, value and date created. | | |
| 11. Face values and cash values of all life insurance policies owned by the applicant and/or spouse. | Current cash values of all life insurance policies owned by the applicant and/or applicant's spouse must be provided. For married applicants, the values of all life insurance policies as of the LTC facility admission date listed on the completed PA 1572 must also be provided. | |
| 12. Registrations to all vehicles owned by the applicant and/or spouse. | | |

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| <p>13. Monthly financial statements for the most current two years of the look-back period for the applicant and/or spouse, from _____ to _____.</p> | <p>Financial accounts include, but are not limited to, investment accounts, bank accounts, Certificates of Deposit, stocks and bonds. The start date of the look-back period is based on whether the individual is a current MA recipient.</p> | |
| <p>14. Semi-annual financial statements (ex. January and June) for the additional three years of the look-back period for applicant and/or spouse, from _____ to _____.</p> | <p>For <u>new applicants</u>, the look-back period begins five years prior to the <u>application date</u>.</p> <p>Example: A new MA LTC facility applicant applies on May 20, 2025. The look-back period will run from May 20, 2020, through May 20, 2025.</p> <p>13. The client must provide as many monthly financial statements as possible for the most current two years of the look-back period of January 2024 through May 2025.</p> <p>14. The client must provide semi-annual financial statements for the additional three years of the look-back period from May 2020 through December 2023 (example, account statements for June 2020, January 2021, June 2021, January 2022, June 2022, January 2023 and June 2023).</p> <p>For <u>current MA recipients</u>, the look-back period begins five years prior to the <u>admission to the LTC facility</u>.</p> <p>Example: A current MA recipient is requesting LTC facility services. The individual was admitted to the LTC facility on May 20, 2025. The look-back period is May 20, 2020, through May 20, 2025.</p> <p>13. The client must provide as many monthly financial statements as possible for the most current two years of the look-back period of January 2024 through May 2025.</p> <p>14. The client must provide semi-annual financial statements for the additional three years of the look-back period from May 2020 through December 2023 (example, account statements for June 2020, January 2021, June 2021, January 2022, June 2022, January 2023 and June 2023).</p> | |

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| <p>15. Financial statements for all accounts owned by the applicant and/or spouse to verify account values as of the LTC facility admission date, if married and a Resource Assessment has not already been completed.</p> | <p>For all married or separated applicants, financial statements to verify all account values for all financial accounts owned by the applicant and/or applicant's spouse must be verified as of the LTC facility admission date listed on the completed PA 1572.</p> | |
| <p>16. Verification of all financial accounts closed since _____ (five years prior to the admission date or application date) to include date(s) closed, value(s) at time closed, and where the money was deposited or how it was spent.</p> | <p>For <u>current MA recipients</u>, documentation of all financial accounts closed for the five-year period prior to the <u>admission date</u> must be provided.</p> <p>For <u>new applicants</u>, documentation of all closed accounts for the five-year period prior to the <u>application date</u> must be provided. Verification of the date the account was closed, closing balance and where the money was deposited or how it was spent should be provided for each closed financial account.</p> | |
| <p>17. Retirement account statement, 401K for applicant and/or spouse.</p> | <p>Verification of retirement accounts should include the penalty for early withdrawal, if applicable.</p> | |
| <p>18. Monthly gross income (Social Security, Supplemental Security Income, pensions, annuities, rental income, dividends, interest, wages, etc.) for the applicant and/or spouse.</p> | | |
| <p>19. Expenses of the spouse residing in the community.</p> | <p>Verification of shelter costs: mortgage(s), rent, utilities, homeowner's insurance, etc.</p> | |