

## 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.