

Preparing for the PHE redetermination

The following is a list of documents we will likely need to respond to the upcoming PHE redetermination request.

For a married couple, we only need the spouse's income and expense information. We do not need any asset information unless it is in joint name with the Medicaid recipient.

All Bank Accounts

- Full statements for the previous three months, including Miller Trust, if any.

Income

- 2023 Social Security statement for recipient and spouse
- 2023 Pension statement for recipient and spouse

Insurance

- Proof of 2023 premium amounts for Medicare supplements for recipient and spouse

Savings Bonds (if any)

- Statements showing amount of bonds and date of purchase

Other Assets

- Blue Book value of any automobile (printout)
- 2022 Tax Return (if filed)
- Proof of deposit of any tax refund for 2022 (if received)

Expenses

- Proof of 2023 rent or mortgage amounts paid by spouse
- Proof of 2023 utilities paid by spouse



If there have been ANY changes that we are NOT aware of such as: change in residence of spouse; substantial changes in income (other than the normal Social Security increase); or a sale of assets in the name of the recipient. We need to be informed as soon as possible and provided with all documentation relating to the change so we can determine what action might need to be taken PRIOR to the redetermination.