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| --- | --- |
| Case name: | Worker: |
| Case Number: | Phone Number: |
| Date of request: | Supervisor: |

Fill out one section for each document that has been identified in case file:

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| --- | --- | --- | --- |
| Name of document or insurance policy | |  | |
| Policy Number is applicable | |  | |
| Category in case file | Date | | pages |
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| Name of document or insurance policy | |  | |
| Policy Number is applicable | |  | |
| Category in case file | Date | | pages |
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| Policy Number is applicable | |  | |
| Category in case file | Date | | pages |
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| Name of document or insurance policy | |  | |
| Policy Number is applicable | |  | |
| Category in case file | Date | | pages |
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All information on the trust or annuity should be in the case file prior to sending it to Central Office for a clearance.

Annuities must have 3167 or 3167A sent to applicant and returned. The 3167 A has to be signed by the insurance company representative to be valid.

Trusts require a complete copy of the trust. Must include a schedule A (can be named differently) which is the list of assets and their value.

However, if “some” but not all information was sent in as a response to pending the case, make the task for the information to be looked at by Central Office rather than denying for failure to provide. Depending on the situation, different information can be used to do a clearance.

If this is request is urgent, be sure to mark task that way in KEES. Also send an email include the case number and name with the e-mail subject to include the words of “urgent need”.. Email [Cynthany.Miller@ks.gov](mailto:Cynthany.Miller@ks.gov), Jeanine.Schieferecke@ks.gov, [Erin.Petitjean@ks.gov](mailto:Erin.Petitjean@ks.gov), and [E&DSpecialtyApps@maximus.com](mailto:E&DSpecialtyApps@maximus.com)

*KDHE-DHCF staff will read the information and decide what effect there is on eligibility; however Policy may ask the Legal Division for advice and interpretation. Do not disclose any Legal Division advice or comments in any communication with or to the applicant, recipient, medical representative, family members, or attorney, or during any fair hearing.*