STATE OF FLORIDA
DEPARTMENT OF VETERANS’ AFFAIRS

RESIDENT STANDARD
APPLICATION PACKET

Clyde E Lassen State Veterans Nursing Home
4650 State Road 16
St. Augustine, FL 32092
904-940-2193
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STATE OF FLORIDA
DEPARTMENT OF VETERANS’ AFFAIRS

APPLICATION FOR CONSIDERATION FOR ADMISSION
GENERAL INFORMATION

This facility is a 120-bed skilled nursing facility of which 60 beds are dedicated to the care of veterans with Alzheimer’s. Additionally, we offer rehabilitation services such as: Physical, Occupational & Speech therapy and Restorative Programs, all under the direct supervision of trained qualified therapists. Hospice and Respite Services are also available.

There is a four-step applicant qualifying process that is as follows:

- **All documents required by the home must be completed before the application can be processed.** Most of these documents are VA, Financial and Medical.
- The completed application will be reviewed by our admission team.
- If on our waiting list, a reassessment will be scheduled before actually admitting the resident.
- Whether your application is approved or disapproved for our waiting list or direct admission, you will be notified by telephone or mail.

The basic requirements for Admission to the Nursing Home are as follows:

- A signed and complete application packet must be returned to the facility by mail or in person.
- Veteran as determined under Chapter 1.01 (14), Florida Statutes (Honorably Discharged from Active Duty).
- Resident of Florida at time of application.
- In need of nursing home care for a medical condition that requires services which fall within the level of care the home has resources and functional ability to provide.
- Complete Application for Admission (notarized page 2: Form 54).
- Complete CF-MED 3008 dated within 30 days of admission.
- History and Physical (if applicant is currently hospitalized) stating the applicant is free of communicable diseases.
- Results of a Chest x-ray taken within the 12 months.

Room and board monthly payments are calculated based on each resident’s personal income (SS, VA benefits, pensions, interest, required minimum distribution(s), etc.), minus $105.00 monthly allowance for personal needs. The maximum cost per day is $237.91 for a semi-private room and $240.66 for a private room. Should the resident’s income exceed the maximum cost per day, other charges may ensue (medications). We require the resident to apply for Medicaid upon admission to help defray the cost of care. The daily rate will include:

- Room and Board
- 24-hour RN Nursing Services
- Licensed Clinical and BSW Social Services
- Certified and Therapeutic Activities
- Restorative Nursing Care
- Daily meals and snacks designed by a Registered Dietician
- Housekeeping and Laundry Services
- Maintenance and free limited television programming
- Free local private phone calls
- Durable and Medical Supplies
- Unit Dose Prescription Medication
- Nutritional Supplements

**Non-routine services, which are not covered in the daily room rate, include but not limited to:**
- Dental Care at any level
- Hearing Aide repair / replacements
- X-ray Services
- Laboratory Charges
- Physical, Occupational and Speech Therapy
- Physician visits such as attending, Podiatrist, Ophthalmologist
- Private Sitters or Personal Care Attendants
- Transportation or non-emergency ambulance travel
- Beauty / Barber charges (Cash or Resident Trust Fund needed)

**If over the daily maximum monetary limit, then the following services are not covered in the daily room rate:**

- Unit Dose Prescription Medication

**ALZHEIMER / TRANSITIONAL / MEMORY UNIT**

**PURPOSE:** It is the purpose of the Clyde E Lassen SVNH Memory Care Unit to offer the most appropriate level of care to meet the physical, mental and psychosocial needs while simultaneously striving to maximize their quality of life in an appropriate and caring environment, through specifically designed programs developed for these particular resident’s.

**PHILOSOPHY OF CARE:** To create a therapeutic, supportive, safe environment considering the sensory, physical, and cognitive losses of the Alzheimer resident(s). Based upon resident needs, memory impaired, dementia, and other appropriate residents who might benefit from our program may also live on this unit.

To provide daily care (taking into consideration the Alzheimer resident sense of reality) along with interacting in an empathetic, accepting and patient manner, so our outcomes enhance their living.

To encourage involvement of families by increasing their perception of control, ability to make decisions and their knowledge base of resident’s functioning level as it declines.

**PROCEDURE:** Pre-screening for this Unit is completed by one of our clinical staff to insure appropriate placement. If the resident’s diagnosis and medical condition meets our criteria for placement, the family or responsible party will be contacted.

**MEDICAID**
Medicaid pays the Nursing Home an established daily room rate per day minus the resident’s gross income and $105.00 monthly allowance for personal needs.
ELIGIBILITY FOR THE PERSON IN THE NURSING HOME:

For an individual to be eligible for ICP Medicaid assistance, there are four requirements considered, which are: an assessment by the Department of Elder Affairs, income limits, asset limits, and a five-year “look back” period.

The income limit to determine eligibility changes yearly and changes are made per Medicaid guidelines as established by the Department of Children and Families.

FOR YOUR SPOUSE AT HOME:

When an individual qualifies for Medicaid, the spouse gets to keep his or her own income regardless of the amount. To find out if you qualify for this benefit, you must check with the Medicaid program office handling your application.

HOW DO I APPLY FOR BENEFITS?

If we feel as though the resident meets the above criteria, or will meet the criteria soon after entering a skilled nursing home, we will assist with the Medicaid application within 10 days of admission. If criteria are met before admission to a skilled nursing home, an application can be filed with Department of Children and Families Services 30 days prior to admission.

MEDICARE

While it is true that Medicare will pay for up to 100 days of skilled nursing home care, the resident must first have a three day hospital qualifying stay and the care received must not be primarily for custodial purposes.

**Summary of Medicare Benefits – up to 100 Days**

<table>
<thead>
<tr>
<th>For days</th>
<th>Medicare pays for covered services</th>
<th>You pay for covered services</th>
</tr>
</thead>
<tbody>
<tr>
<td>1–20</td>
<td>Full cost</td>
<td>Nothing</td>
</tr>
<tr>
<td>21–100</td>
<td>All but a daily coinsurance*</td>
<td>A daily coinsurance*</td>
</tr>
<tr>
<td>Beyond 100</td>
<td>Nothing</td>
<td>Full cost</td>
</tr>
</tbody>
</table>

* There is a Medicare Part A co-insurance daily rate due from the resident while under a Medicare Part A stay beginning with the 21st day of covered services, and this rate changes annually based on Medicare. Your supplemental insurance or Medicaid (if applicable) may pay this co-insurance. Please be sure to give the Admission Coordinator your supplemental insurance information at time of admission. If there are any changes to your primary or supplemental insurance policies after admission, the Business Office must be contacted within 10 calendar days of any change(s). Failure to do so may result in the resident incurring any and/or all incurred charges for services.

You must also remember that as resident progresses in their recovery, a determination will be made as to the level of care still required. At some point during recovery, skilled nursing or rehabilitative care may no longer be needed and Medicare payments will cease.
CHECKLIST FOR FORMS AND INFORMATION REQUIRED

All forms and information required unless noted IF APPLICABLE

REQUIRED FORMS INCLUDED WITH APPLICATION PACKET

___ “FORM 54” APPLICATION FOR ADMISSION - MUST BE NOTARIZED
___ “10 10 EZ” APPLICATION FOR HEALTH BENEFITS
___ FINANCIAL INFORMATION RELEASE – MUST BE NOTARIZED
___ VETERAN’S CONTACT INFO, MORTUARY, AND PRIMARY CONTACT INFORMATION
___ FAMILY QUESTIONNAIRE
___ CUSTOMARY ROUTINES
___ PERSONAL PROFILE
___ INCOME TAX STATEMENT FORM - IF APPLICABLE
___ REQUEST FOR COPY OF TAX STATEMENT – IF APPLICABLE
___ AUTHORIZATION TO RELEASE MEDICAL RECORDS AND HEALTH INFORMATION
___ AGENCY FOR HEALTH CARE ADMINISTRATION / DEPT OF ELDER AFFAIRS INFORMED CONSENT

REQUIRED FORMS FOR PHYSICIAN TO COMPLETE (included in application packet)

___ “3008” - MEDICAL CERTIFICATION FOR MEDICAID LONG-TERM CARE SERVICES AND PATIENT TRANSFER FORM
___ MEDICAL VERIFICATION OF CAPACITY OR INCAPACITY

MEDICAL INFORMATION AND OTHER RECORDS REQUIRED

___ MOST RECENT HISTORY AND PHYSICAL
___ CURRENT MEDICATION LIST
___ CARE PLAN (IF VETERAN IS CURRENTLY LIVING IN SKILLED NURSING)
___ MOST RECENT 30 DAYS NURSING PROGRESS NOTES (IF VETERAN IS CURRENTLY LIVING IN SKILLED NURSING)
___ MOST RECENT LAB REPORT
___ MOST RECENT CXR REPORT OR PPD RESULTS (FROM PREVIOUS 12 MONTHS)
___ ORGAN DONOR (IF APPLICABLE)
___ COPY OF SERVICE CONNECTED AWARD LETTER (IF APPLICABLE)

ADDITIONAL DOCUMENTS AND INFORMATION REQUIRED (do not include original documents)

PROOF OF MILITARY HONORABLE DISCHARGE DOCUMENTS – ONLY ONE FORM IS NECESSARY
___ DD214
___ VA ELECTRONIC RECORD (SHARE)
___ CERTIFIED STATEMENT OF MILITARY SERVICE

ADVANCED DIRECTIVES

___ DURABLE POWER OF ATTORNEY AS FINANCIAL ADVOCATE OR GUARDIANSHIP
___ DURABLE POWER OF ATTORNEY AS MEDICAL ADVOCATE OR HEALTH CARE SURROGATE
___ LIVING WILL (IF APPLICABLE)
___ DNR (IF APPLICABLE)
___ PROOF OF FLORIDA RESIDENCY (i.e. COPY OF FL ID, DRIVERS LICENSE, OR VOTER ID CARD)
___ MEDICARE CARD (copy of FRONT and BACK of card)
___ SOCIAL SECURITY CARD (copy of FRONT and BACK of card)
___ OTHER MEDICAL INSURANCE CARDS (copy of FRONT and BACK of card) – (IF APPLICABLE)
___ BIRTH CERTIFICATE
___ MARRIAGE LICENSE (IF APPLICABLE)

FINANCIAL INFORMATION REQUIRED

___ Proof of all income is required to determine Cost of Care
___ COPY OF CURRENT NOCA (IF APPLICABLE)
TO DETERMINE COST OF CARE FOR ANY VETERAN WITH A SERVICE CONNECTED DISABILITY OF LESS THAN 70% PLEASE PROVIDE THE FOLLOWING:

☐ Yes  ☐ No  Does the veteran have a service connected disability less than 70%? If yes, please provide a copy of the veteran’s current VA Summary of Benefits.

☐ Yes  ☐ No  Does the veteran currently receive Social Security benefits? If yes, please provide a copy of the veteran’s most recent Social Security Benefit Letter (not the Social Security tax statement)

☐ Yes  ☐ No  Does the veteran currently receive Aid & Attendance? If yes, please provide a copy of the veteran’s most recent Aid & Attendance Benefit Letter.

☐ Yes  ☐ No  Does the veteran receive a pension? If yes, please provide a copy of the veteran’s most recent pension statement.

☐ Yes  ☐ No  Does the veteran have any investment accounts or received a Required Minimum Distribution? If yes, please provide copies of the most recent 3 months statements for each account. Please include ALL pages of each statement.

☐ Yes  ☐ No  Does the veteran receive any income from rental property? If yes, please provide a copy of the current rental agreement for each property.

☐ Yes  ☐ No  Does the veteran currently have a Medicare supplemental insurance? If yes, please provide a copy of the veteran’s most recent statement from the supplemental insurance company that states the cost of the monthly premium for the Medicare supplemental insurance.

☐ Yes  ☐ No  Does the veteran have any bank accounts (savings, checking)? If yes, please provide copies of the most recent 3 months statements for each account. Please include ALL pages of each statement and make sure the veteran’s name is printed on each statement. Some statements printed from a home computer do not have the veteran’s name.

☐ Yes  ☐ No  Did the veteran file a tax return for the last year? If yes, please provide a copy of the tax return. If the veteran did not file or will not file for the most recent year, please complete the INCOME TAX STATEMENT form (page 23 of application packet). If the resident completed a tax return and needs to request a copy form the IRS, please complete the REQUEST FOR COPY OF TAX RETURN.
**INSTRUCTIONS**

a) Print or type and answer all items. **PAGE 2 MUST BE NOTARIZED**
b) Individuals must meet the criteria required by the U.S. Department of Veterans Affairs for veteran status.
c) Must be resident of Florida immediately preceding this application.
d) Must be in need of institutional long term health care services.

**A. PERSONAL INFORMATION**

<table>
<thead>
<tr>
<th>VETERAN’S LAST NAME</th>
<th>FIRST NAME</th>
<th>MIDDLE NAME</th>
<th>*SOCIAL SECURITY #</th>
<th>VA CLAIM #</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPOUSE NAME:</td>
<td>SPOUSE’S SSN/DATE OF BIRTH</td>
<td>VETERAN’S MEDICARE #</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAILING ADDRESS:</td>
<td>Street:</td>
<td>City, State Zip Code:</td>
<td>Phone Number:</td>
<td></td>
</tr>
<tr>
<td>RESIDENCE ADDRESS:</td>
<td>Street:</td>
<td>City, State Zip Code:</td>
<td>Phone Number:</td>
<td></td>
</tr>
<tr>
<td>Place of Residence:</td>
<td>Own Home</td>
<td>Hospital</td>
<td>Nursing Home</td>
<td></td>
</tr>
<tr>
<td>PHONE NUMBERS</td>
<td>Home:</td>
<td>Work:</td>
<td>Other:</td>
<td></td>
</tr>
</tbody>
</table>

Date of Birth: Birthplace: Sex: Male ☐ Female ☐
Marital Status: Single ☐ Married ☐ Separated ☐ Divorced ☐ Widowed ☐
Date of Marriage: ____ Date of Divorce: ____

Have you been a patient or resident in a hospital or nursing home during the past year?
YES ☐ NO ☐ Name of Facility: ____________________________
Address of Facility: ____________________________

Have you been treated in a Federal VA facility before? YES ☐ NO ☐ If so, where? ____________________________
Please give dates: ____________________________

Have you ever been convicted of a Felony? Yes ☐ No ☐ If yes, in what state? ____________________________

**B. MILITARY INFORMATION ATTACH A COPY OF MILITARY DISCHARGE PAPERS (DD-214)**

<table>
<thead>
<tr>
<th>BRANCH OF SERVICE</th>
<th>SERVICE NUMBER</th>
<th>DATE ENTERED</th>
<th>DATE DISCHARGED</th>
<th>CHARACTER OF SERVICE</th>
</tr>
</thead>
</table>

*The State of Florida Department of Veterans’ Affairs (FDVA) is asking you to provide your Social Security Number. If you give FDVA your Social Security Number, we will use it to verify honorable Veteran status, for billing purposes or for other purposes as authorized or required by law. The information you supply may be verified through a computer-matching program. FDVA may disclose the information you put on this form as permitted by law. You do not have to provide the information to FDVA, but if you do not, we will be unable to process your application for admission and serve your medical needs.
### C. GROSS MONTHLY INCOME INFORMATION

<table>
<thead>
<tr>
<th>MONTHLY INCOME</th>
<th>APPLICANT</th>
<th>SPOUSE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Gross</td>
<td>Net</td>
</tr>
<tr>
<td>VA Pension/VA Compensation</td>
<td></td>
<td></td>
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<tr>
<td>Social Security</td>
<td></td>
<td></td>
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<tr>
<td>U.S. Civil Service</td>
<td></td>
<td></td>
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<tr>
<td>U.S. Railroad Retirement</td>
<td></td>
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<tr>
<td>Military Retirement</td>
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<tr>
<td>Employment</td>
<td></td>
<td></td>
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<tr>
<td>Other Retirement, or Income</td>
<td>ASSET VALUE/MONTHLY INCOME</td>
<td>ASSET VALUE/MONTHLY INCOME</td>
</tr>
<tr>
<td>Source:</td>
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<td>Source:</td>
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<td>Source:</td>
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</tbody>
</table>

Attach extra page if more space is needed

### D. Legal Representative for Health Care and Financial Authority:

Provide name, address, and phone number of designated authority

Name: __________________________________________

Address: _______________________________________

City, State, Zip code: ___________________________ Phone number: ______________________

### E. AFFIDAVIT

I am applying for admission to the State Veterans Nursing Home. I have been a resident of the State of Florida immediately preceding the date of this application. All of the statements on this application are true and complete to the best of my knowledge. If admitted, I understand that all of my income, regardless of source, may be contributed toward the cost of my care. I will be allowed to retain $105.00 for my own personal use. If my income is above the calculated cost of care, I will be required to pay the full amount. I agree to follow the rules of conduct and policies and procedures of the Department of Veterans’ Affairs and the State Veterans’ Nursing Home. I AGREE TO APPLY FOR ALL FINANCIAL ASSISTANCE AVAILABLE TO ME INCLUDING MEDICAID. I agree to the release of all medical and financial information needed to complete this application process.

NOTE: (Check if applicable) ☐ I have a need for high level nursing home care and am unable to defray the expense of nursing home care.

Applicant’s Signature, or person authorized to sign for applicant ___________________________ Date signed ___________________

SUBSCRIBED AND SWORN TO ME THIS _____DAY OF ___________ YEAR___________.

NOTARY PUBLIC _______________________________________________

COUNTY _______________STATE _______________ (PERSONALLY KNOWN____ OR TYPE OF ID) ___________________
# APPLICATION FOR BENEFITS VA FORM 10-10-EZ

## SECTION I - GENERAL INFORMATION

Federal law provides criminal penalties, including a fine and/or imprisonment for up to 5 years, for concealing a material fact or making a materially false statement. (Sec 18 U.S.C. 1001)

1. **VETERAN'S NAME** (Last, First, Middle Name)
2. **PREFERRED NAME**
3. **MOTHER'S MAIDEN NAME**
4. **BIRTH SEX**
   - [ ] MALE
   - [ ] FEMALE
5. **SELF-IDENTIFIED GENDER IDENTITY**
   - [ ] MALE
   - [ ] FEMALE
6. **ARE YOU SPANISH, HISPANIC, OR LATINO?**
   - [ ] YES
   - [ ] NO
7. **WHAT IS YOUR RACE?** (You may check more than one. Information is required for statistical purposes only.)
   - [ ] ASIAN
   - [ ] AMERICAN INDIAN OR ALASKA NATIVE
   - [ ] BLACK OR AFRICAN AMERICAN
   - [ ] WHITE
   - [ ] NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER
8. **SOCIAL SECURITY NO.**
9. **VA CLAIM NUMBER**
10. **DATE OF BIRTH** (mm/dd/yyyy)
11. **PLACE OF BIRTH** (City and State)
12. **RELIGION**

## SECTION II - MILITARY SERVICE INFORMATION

13. **TYPE OF BENEFIT(S) APPLYING FOR**
   - [ ] ENROLLMENT/HEALTH SERVICES
   - [ ] DENTAL
   - [ ] MARRIED
   - [ ] NEVER MARRIED
   - [ ] SEPARATED
   - [ ] WIDOWED
   - [ ] DIVORCED
14. **NEXT OF KIN NAME**
15. **NEXT OF KIN ADDRESS**
16. **NEXT OF KIN PHONE NO.** (Include Area Code)
17. **NEXT OF KIN WORK PHONE NO.** (Include Area Code)
18. **DESIGNEE - INDIVIDUAL TO RECEIVE POSSESSION OF YOUR PERSONAL PROPERTY LEFT ON PREMISES UNDER VA CONTROL AFTER YOUR DEPARTURE OR AT THE TIME OF DEATH**
   (Note: This does not constitute a will or transfer of title)

19. **AM I ENROLLING TO OBTAIN MINIMUM ESSENTIAL COVERAGE UNDER THE AFFORDABLE CARE ACT**
   - [ ] YES
   - [ ] NO
20. **WHICH VA MEDICAL CENTER OR OUTPATIENT CLINIC DO YOU PREFER?**
    (For listing of facilities visit [www.va.gov/directory](http://www.va.gov/directory))
21. **WOULD YOU LIKE FOR VA TO CONTACT YOU TO SCHEDULE YOUR FIRST APPOINTMENT?**
   - [ ] YES
   - [ ] NO

## Additional Fields

2. **MILITARY HISTORY** (Check yes or no)
   - [ ] YES
   - [ ] NO
   - [ ] G. DO YOU HAVE A VA SERVICE-CONNECTED RATING?
   - [ ] IF "YES", WHAT IS YOUR RATED PERCENTAGE ______ %

---

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### SECTION III - INSURANCE INFORMATION

| 1. ENTER YOUR HEALTH INSURANCE COMPANY NAME, ADDRESS AND TELEPHONE NUMBER (include coverage through spouse or other person) |

<table>
<thead>
<tr>
<th>2. NAME OF POLICY HOLDER</th>
<th>3. POLICY NUMBER</th>
<th>4. GROUP CODE</th>
<th>5. ARE YOU ELIGIBLE FOR MEDICAID?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>□ YES □ NO</td>
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<table>
<thead>
<tr>
<th>6A. ARE YOU ENROLLED IN MEDICARE HOSPITAL INSURANCE PART A?</th>
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<tbody>
<tr>
<td>□ YES □ NO</td>
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<table>
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<tr>
<th>6B. EFFECTIVE DATE (mm/dd/yyyy)</th>
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</table>

### SECTION IV - DEPENDENT INFORMATION

<table>
<thead>
<tr>
<th>1. SPOUSE’S NAME (Last, First, Middle Name)</th>
<th>2. CHILD’S NAME (Last, First, Middle Name)</th>
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<tbody>
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<table>
<thead>
<tr>
<th>1A. SPOUSE’S SOCIAL SECURITY NUMBER</th>
</tr>
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</table>

<table>
<thead>
<tr>
<th>1B. SPOUSE’S DATE OF BIRTH (mm/dd/yyyy)</th>
<th>1C. SPOUSE SELF-IDENTIFIED GENDER IDENTITY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>□ MALE □ FEMALE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2A. CHILD’S DATE OF BIRTH (mm/dd/yyyy)</th>
<th>2B. CHILD’S SOCIAL SECURITY NO.</th>
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<tbody>
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<thead>
<tr>
<th>2C. DATE CHILD BECAME YOUR DEPENDENT (mm/dd/yyyy)</th>
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<thead>
<tr>
<th>2D. CHILD’S RELATIONSHIP TO YOU (Check one)</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ SON □ DAUGHTER □ STEPSON □ STEPDUGHTER</td>
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<tr>
<th>2E. WAS CHILD PERMANENTLY AND TOTALLY DISABLED BEFORE THE AGE OF 18?</th>
</tr>
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<tbody>
<tr>
<td>□ YES □ NO</td>
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<thead>
<tr>
<th>2F. IF CHILD IS BETWEEN 18 AND 23 YEARS OF AGE, DID CHILD ATTEND SCHOOL LAST CALENDAR YEAR?</th>
</tr>
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<tbody>
<tr>
<td>□ YES □ NO</td>
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<tr>
<th>3. IF YOUR SPOUSE OR DEPENDENT CHILD DID NOT LIVE WITH YOU LAST YEAR, DID YOU PROVIDE SUPPORT?</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ YES □ NO</td>
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<thead>
<tr>
<th>2G. EXPENSES PAID BY YOUR DEPENDENT CHILD FOR COLLEGE, VOCATIONAL REHABILITATION OR TRAINING (e.g., tuition, books, materials)</th>
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<tbody>
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### SECTION V - EMPLOYMENT INFORMATION

<table>
<thead>
<tr>
<th>1A. VETERAN’S EMPLOYMENT STATUS (Check one).</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ FULL TIME □ PART TIME □ NOT EMPLOYED □ RETIRED</td>
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<table>
<thead>
<tr>
<th>1B. DATE OF RETIREMENT</th>
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<table>
<thead>
<tr>
<th>1C. COMPANY NAME. (Complete if employed or retired)</th>
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<table>
<thead>
<tr>
<th>1D. COMPANY ADDRESS (Complete if employed or retired - Street, City, State, ZIP)</th>
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<thead>
<tr>
<th>1E. COMPANY PHONE NUMBER (Complete if employed or retired) (Include area code)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

### SECTION VI - PREVIOUS CALENDAR YEAR GROSS ANNUAL INCOME OF VETERAN, SPOUSE AND DEPENDENT CHILDREN

<table>
<thead>
<tr>
<th>1. GROSS ANNUAL INCOME FROM EMPLOYMENT (wages, bonuses, tips, etc.) EXCLUDING INCOME FROM YOUR FARM, RANCH, PROPERTY OR BUSINESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>VETERAN</td>
</tr>
<tr>
<td>----------</td>
</tr>
<tr>
<td>$</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. NET INCOME FROM YOUR FARM, RANCH, PROPERTY OR BUSINESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>3. LIST OTHER INCOME AMOUNTS (e.g., Social Security, compensation, pension interest, dividends) EXCLUDING WELFARE</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
</tr>
</tbody>
</table>

### SECTION VII - PREVIOUS CALENDAR YEAR DEDUCTIBLE EXPENSES

<table>
<thead>
<tr>
<th>1. TOTAL NON-REIMBURSED MEDICAL EXPENSES PAID BY YOU OR YOUR SPOUSE (e.g., payments for doctors, dentists, medications, Medicare, health insurance, hospital and nursing home) VA will calculate a deductible and the net medical expenses you may claim.</th>
</tr>
</thead>
<tbody>
<tr>
<td>VETERAN</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td>$</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. AMOUNT YOU PAID LAST CALENDAR YEAR FOR FUNERAL AND BURIAL EXPENSES (INCLUDING PREPAID BURIAL EXPENSES) FOR YOUR DECEASED SPOUSE OR DEPENDENT CHILD (Also enter spouse or child’s information in Section VI)</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. AMOUNT YOU PAID LAST CALENDAR YEAR FOR YOUR COLLEGE OR VOCATIONAL EDUCATIONAL EXPENSES (e.g., tuition, books, fees, materials) DO NOT LIST YOUR DEPENDENTS’ EDUCATIONAL EXPENSES.</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
</tr>
</tbody>
</table>
## APPLICATION FOR HEALTH BENEFITS

### SECTION VII - CONSENT TO COPAYS AND TO RECEIVE COMMUNICATIONS

By submitting this application you are agreeing to pay the applicable VA copays for treatment or services of your NSC conditions as required by law. You also agree to receive communications from VA to your supplied email or mobile number.

### ASSIGNMENT OF BENEFITS

I understand that pursuant to 38 U.S.C. Section 1729 and 42 U.S.C. 2651, the Department of Veterans Affairs (VA) is authorized to recover or collect from my health plan (HP) or any other legally responsible third party for the reasonable charges of nonservice-connected VA medical care or services furnished or provided to me. I hereby authorize payment directly to VA from any HP under which I am covered (including coverage provided under my spouse's HP) that is responsible for payment of the charges for my medical care, including benefits otherwise payable to me or my spouse. Furthermore, I hereby assign to the VA any claim I may have against any person or entity who is or may be legally responsible for the payment of the cost of medical services provided to me by the VA. I understand that this assignment shall not limit or prejudice my right to recover for my own benefit any amount in excess of the cost of medical services provided to me by the VA or any other amount to which I may be entitled. I hereby appoint the Attorney General of the United States and the Secretary of Veterans’ Affairs and their designees as my Attorneys-in-fact to take all necessary and appropriate actions in order to recover and receive all or part of the amount herein assigned. I hereby authorize the VA to disclose, to my attorney and to any third party or administrative agency who may be responsible for payment of the cost of medical services provided to me, information from my medical records as necessary to verify my claim. Further, I hereby authorize any such third party or administrative agency to disclose to the VA any information regarding my claim.

All applicants must sign and date this form. Refer to instructions which define who can sign on behalf of the veteran.

### SIGNATURE OF APPLICANT

(Sign in ink)
## APPOINTMENT OF VETERANS SERVICE ORGANIZATION AS CLAIMANT’S REPRESENTATIVE

### Important - Please read the Privacy Act and Respondent Burden on Reverse Before Completing the Form

1. **Last-First-Middle Name of Veteran**
2. **VA File Number** (Include prefix)
3A. **Name of service organization recognized by the Department of Veterans Affairs**

### Instructions - Type or Print All Entries

4. **Social Security Number (or Service Number, if no SSN)**  
5. **Insurance Number(s)** (Include letter prefix)
6. **Name of Claimant** (If other than veteran)
7. **Relationship to Veteran**
8. **Address of Claimant** (No. and street or rural route, city or P.O. State and ZIP Code)
9. **Claimant’s Telephone Numbers** (Include Area Code)
   - A. **Daytime**
   - B. **Evening**
10. **Email Address** (If applicable)
11. **Date of This Appointment**

### Authorization for Representative’s Access to Records Protected by Section 7332, Title 38, U.S.C.

- **Drug Abuse**
- **Alcoholism or Alcohol Abuse**
- **Infection with the Human Immunodeficiency Virus (HIV)**
- **Sickle Cell Anemia**

### Limitation of Consent

- **I authorize disclosure of records related to treatment for drug abuse, alcoholism or alcohol abuse, infection with the Human Immunodeficiency Virus (HIV), or sickle cell anemia.**

### Authorization to Change Claimant’s Address

- **I authorize any representative of the organization named in Item 3A to act on my behalf to change my address in my VA records.**

### Signature of Veteran or Claimant

15. **(Do Not Print)**
16. **Date Signed**

### Signature of Veterans Service Organization Representative Named in Item 3B

17. **(Do Not Print)**
18. **Date Signed**

### VA Form

- **VA Form 21-22**
- **Note:** As long as this appointment is in effect, the organization named herein will be recognized as the sole representative for preparation, presentation and prosecution of your claim before the Department of Veterans Affairs in connection with your claim or any portion thereof.
FINANCIAL INFORMATION RELEASE

Date: _____________________

To Whom It May Concern:

I hereby grant permission and authorize any bank, building association, employer, insurance company, real estate company, government agency or any financial institution of any kind or character to disclose to any agent of the Florida Department of Veterans’ Affairs full information as to my bank accounts, earnings, insurance policies, property or benefits for the time period listed below.

This release is valid from Admission to Discharge.

Applicant’s signature or person authorized to sign for the applicant:

_____________________________________________________ Veteran or DPOA

SUBSCRIBED AND SWORN TO ME THIS _______DAY OF _________YEAR______

NOTARY PUBLIC______________________________________

COUNTY _______________STATE_______

Name(s) on Account: __________________________________

Documents Requested: __________________________________

Signed: __________________________________

Florida Department of Veterans’ Affairs
MEDICAL RECORDS AND HEALTH INFORMATION RELEASE

I, ____________________________, ____________________________, ____________________________, authorize, (Name) (DOB) (SSN)

to disclose to ____________________________________________

Name of facility making disclosure Name of person and/or facility to which disclosure is to be made

at ________________________________________________________

(Address of person or facility)

the above individual’s health information as described below.

The purpose of the disclosure is to ________________________________________________________________

Note: Records may be shared with other Florida State Veterans’ Homes for placement and/or continuum of care.

Initial below for release of information

1. The undersigned hereby authorizes the release of copies of all medical records included but not limited to the following:

   Physician’s orders
   Discharge summary
   History & physical
   X-ray/Lab/EKG reports
   MDS
   Physician’s progress notes

   Nursing notes
   Care plans
   Medication list
   Dietary notes
   Activity notes
   Social Services assessment

Consultations-scanify: ________________________________________________________________

Other-specify: _______________________________________________________________________

2. I understand and hereby authorize the release of information in my medical record, which may include information relating to sexually transmitted disease, acquired immunodeficiency syndrome (AIDS) or human immunodeficiency virus (HIV).

3. I understand and hereby authorize the release of information in my medical record, which may also include information about behavioral or mental health services and treatment for
alcohol and drug abuse. (Note: Release of psychiatric or substance abuse progress notes require a separate authorization.)

I understand that I have a right to revoke this authorization at any time. I understand that if I revoke the authorization I must do so in writing and present my written revocation to the health information management department.

I understand that the revocation will not apply to information that has already been released in response to this authorization. I understand that the revocation will not apply to my insurance company when the law provides my insurer with the right to contest a claim under my policy. Unless otherwise revoked, this authorization will expire if my application is denied, or if accepted, upon my permanent transfer or discharge from the facility.

I understand that authorizing the disclosure of this health information is voluntary. I can refuse to sign this authorization. I need not sign this form in order to obtain treatment. I understand the potential for the information disclosed pursuant to this authorization may be subject to re-disclosure by the recipient, and may no longer be protected by the Federal privacy laws

______________________________________________________________________________
Signature of Resident or Legal Representative
Date

______________________________________________________________________________
If signed by Legal Representative, relationship to Resident
Date

______________________________________________________________________________
Signature of Witness
Date
VETERAN’S CONTACT INFORMATION

Veteran’s Name: ________________________________

Does the veteran live:

☐ At home

☐ In an Assisted Living Facility  Name of facility: _______________________

☐ In a Skilled Nursing Facility  Name of facility: _______________________

Street Address: ________________________________

City, State, & Zip Code: ________________________________

Telephone: ___________________________  Fax: _________________________

MORTUARY / FUNERAL HOME CONTACT INFORMATION

Name of Mortuary/Funeral Home: ________________________________

Street Address: ________________________________

City: ___________________________  State: _______  Zip Code: _________

Telephone Number: ________________________________

EMERGENCY CONTACT INFORMATION

Contact Name: ________________________________

Relationship to Veteran: ________________________________

Telephone: ___________________________  Email: _________________________
FAMILY QUESTIONNAIRE

We request that you complete this form to the best of your ability in order to ensure that we have sufficient and relevant information to care for your loved one. Our sincere intent in asking you to answer these questions is to obtain information in which may help us to enhance the quality of his/her life to the greatest extent possible.

VETERAN’S NAME: ___________________________ NICKNAME: ___________________________

DATE OF BIRTH: _____/_____/_____ AGE: _____ PLACE OF BIRTH: ___________________________

CURRENT MARITAL STATUS: ☐ Single ☐ Married ☐ Widowed ☐ Divorced ☐ Separated

HIGHEST LEVEL OF EDUCATION COMPLETED: ___________________________________________

FORMER OCCUPATION(S): _____________________________________________________________

NAME OF DURABLE POWER OF ATTORNEY (DPOA) or GUARDIAN: _______________________

WHAT IS THE RELATIONSHIP OF DPOA OR GUARDIAN TO THE VETERAN? ________________

NAME(S) OF CHILDREN OR OTHER RELATIVES

_________________________________________ RELATIONSHIP (CHOOSE ONE)

☐ DISTANT ☐ POOR ☐ GOOD

_________________________________________

☐ DISTANT ☐ POOR ☐ GOOD

_________________________________________

☐ DISTANT ☐ POOR ☐ GOOD

_________________________________________

☐ DISTANT ☐ POOR ☐ GOOD

WITH WHOM DOES THE VETERAN HAVE THE BEST RELATIONSHIP? _________________________

WHY? _____________________________________________________________________________

PRIOR LIVING SITUATION (HOME, ANOTHER FACILITY, LIVING WITH FAMILY MEMBER):

__________________________________________________________________________________

ADMITTED TO STATE VETERANS’ HOME FROM: ____________________________

DOES THE VETERAN HAVE A MEMORY PROBLEM? ☐ YES ☐ NO

HOW LONG HAS THE VETERAN HAD A MEMORY PROBLEM?

☐ 1 YEAR ☐ 1-3 YEARS ☐ 3-5 YEARS ☐ 5 YEARS OR MORE

WAS THE ONSET OF THE PROBLEM: ☐ SUDDEN ☐ GRADUAL

HAVE THERE BEEN ANY CHANGES IN THE VETERAN’S MOOD OR BEHAVIOR IN THE LAST 6
MONTHS (I.E., FALLING, INCREASED CONFUSION, MOOD CHANGES)?

☐ NO ☐ YES, EXPLAIN: __________________________________________________________________

DOES THE VETERAN HAVE A HISTORY OF PSYCHIATRIC PROBLEMS (I.E., SYMPTOMS OF
DEPRESSION, NEEDED PSYCHIATRIC HOSPITALIZATION, MEDICATION, PSYCHOTHERAPY, ETC.)?

__________________________________________________________________________________
WHAT MEDICATIONS IS THE VETERAN CURRENTLY TAKING AND WHY:
__________________________________________________________________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________

MOOD AND BEHAVIOR
Check (√) all behaviors that apply and check (√) the appropriate code number.
Codes:  1 = Behavior occurs less than daily  
       2 = Behavior occurs daily or more frequently

☐   Wandering       1  2
☐   Continuous pacing
☐   Repetitive behaviors (words, actions)
☐   Withdrewn/depressed (long periods of time inactive)
☐   Appears anxious, worried
☐   Crying, tearful
☐   Comments about death of self or others
☐   Sleep disturbances (insomnia or frequent napping)
☐   Mood swings (sudden changes in mood)
☐   Over-eating
☐   Under-eating
☐   Clinging (to caregiver, can’t leave sight)/needs reassurance
☐   Verbally abusive (curses, screams, threatens)
☐   Physically abusive (strikes out, grabs)
☐   Rummaging or hording (goes through garbage or hides things)
☐   Inappropriate toileting habits
☐   Inappropriate sexual behavior
☐   Sun-downing behavior (difficult behaviors or increased confusion occurs in late afternoon)
☐   Hallucinations (hears or sees things that are not there)
☐   Delusions (tells stories that are not fact based)
☐   Suspiciousness, paranoia
☐   Resistant to care, stiffening, rigidity, refusal
☐   Repetitive verbalizations or behaviors
☐   Catastrophic reactions (overacts to stressful situations)

DOES THE VETERAN HAVE A HISTORY OF: SMOKING ☐ YES ☐ NO ☐ UNKNOWN
(IF YES, SPECIFY CIGARETTES, CIGARS, PIPE, ETC., AND AVERAGE DAILY USE:
_____________________________________________________________________________________

ALCOHOL USE ☐ YES ☐ NO ☐ UNKNOWN
EXPLAIN: ________________________________________________________________

DRUG USE ☐ YES ☐ NO ☐ UNKNOWN
IF YES, SPECIFY TYPE AND QUANTITY: ______________________________________________

DESCRIBE BEHAVIOR OF THE VETERAN THAT REFLECTS THEIR:
(A) ANGER: ________________________________________________________________

(B) DEPRESSION/SADNESS: _______________________________________________
WHAT TRAUMATIC EVENTS HAS THE VETERAN EXPERIENCED IN THE PAST 10 YEARS (I.E. DEATH OF A LOVED ONE, DIAGNOSED WITH TERMINAL ILLNESS, ETC.) AND HOW DID HE/SHE HANDLE THIS? WHAT COPING SKILLS OR RESOURCES DID THEY UTILIZE (I.E. HELP FROM FAMILY, FRIENDS, COMMUNITY SUPPORT, SPIRITUAL FAITH, ETC.)? WHAT IS AN EFFECTIVE INTERVENTION THAT OUR STAFF MIGHT USE DURING DIFFICULT TIMES?

IS THERE A PARTICULAR ANNIVERSARY, HOLIDAY, EVENT OF THE PAST OR SITUATION THAT MAY TRIGGER SADNESS, WITHDRAWAL, AGITATION, OR IN ANY WAY AFFECT THEIR BEHAVIOR IN THEIR NEW ENVIRONMENT?

IDENTIFY A PLEASANT/FUN ACTIVITY FOR THE VETERAN WHICH COULD BE IMPLEMENTED RIGHT NOW (I.E. SINGING A FAVORITE SONG, WATCHING SPECIAL TV PROGRAM, LISTENING TO HYMNS, ETC.).

WHAT METHOD OF REINFORCEMENT IS THE MOST SATISFYING FOR THE VETERAN? (IE: SOCIAL, TOUCHING, HUGGING, PATS ON THE BACK, PRAISE, COMPLIMENT)

TANGIBLE—PRIZES, FOOD, ETC:

IN YOUR OPINION, HOW WILL THE VETERAN ADJUST/ADAPT TO LIFE IN THIS FACILITY?

WHAT CAN OUR STAFF DO TO MAKE THIS TRANSITION EASIER FOR THEM?

IS THERE ANYTHING ELSE WE SHOULD KNOW ABOUT THIS PERSON?

PERSONAL INFORMATION TO INDIVIDUALIZE CARE

1. WHAT TYPE OF LEISURE ACTIVITIES HAS YOUR RELATIVE ENJOYED IN THE PAST 6 MONTHS?

2. WHAT TYPE OF LEISURE ACTIVITIES CAN/DOES YOUR FAMILY MEMBER STILL ENJOY DOING?

3. ARE THERE SITUATIONS THAT UPSET YOUR RELATIVE?
   ☐ CAR RIDES      ☐ BEING ALONE      ☐ UNFAMILIAR SURROUNDINGS
   ☐ DEMANDS (PERSONAL CARE)      ☐ BEING TOUCHED
   ☐ OTHER: ______________________________

4. DO YOU HAVE APPROACHES YOU USE TO HELP CALM YOUR RELATIVE?
   ☐ HUMOR      ☐ AFFECTION      ☐ FOOD (SNACK)      ☐ GOING FOR A WALK
☐ LEAVING ALONE
☐ OTHER: _________________________________________________

5. DOES YOUR RELATIVE EXPERIENCE ROUTINE OR OCCASIONAL DISCOMFORT DUE TO PHYSICAL CONDITIONS (HEADACHES, JOINT PAIN, ETC.)?
__________________________________________________________________________________________________________________________________________

6. CLUES THAT MAY INDICATE YOUR RELATIVE IS EXPERIENCING PAIN OR ILLNESS (VERBAL OR NON-VERBAL).
__________________________________________________________________________________________________________________________________________

7. ARE THERE LIFE EXPERIENCES OR ACCOMPLISHMENTS YOUR RELATIVE ENJOYS RECALLING?

CHILDHOOD ____________________________________________________________________________________________

MIDDLE YEARS ____________________________________________________________________________________________

RETIREMENT ____________________________________________________________________________________________

8. WERE THERE UNPLEASANT OR SENSITIVE LIFE EXPERIENCES WHICH THE VETERAN STILL RECALLS AND WHICH STAFF NEEDS TO BE AWARE? PLEASE INDICATE HOW TO RESPOND.

CHILDHOOD ____________________________________________________________________________________________

MIDDLE YEARS ____________________________________________________________________________________________

RETIREMENT ____________________________________________________________________________________________

Signature of individual completing this form: ______________________________________________________________

Relationship to Veteran: __________________________________________________________________________Date: ____________________
CUSTOMARY ROUTINES

VETERAN’S NAME: __________________________________________________________

Cycle of Daily Events (Check all that apply)
☐ Stays up late at night (after 9 PM) ☐ Early riser (before 7 AM)
☐ Goes out 1+days a week ☐ Frequent insomnia/other sleep disruptions
☐ Spends most of time alone/watching TV ☐ Naps regularly during day (at least one hour)
☐ Moves independently indoors ☐ Stays busy with hobbies, reading or fixed daily routine
☐ Use of tobacco products at least daily
☐ Use of OTC drugs at least daily

Eating Patterns (Check all that apply)
☐ Distinct food preferences ☐ Ignores dietary precautions
☐ Eats between meals all or most days ☐ Skips Meals
☐ Diet Restrictions ☐ Prefers sweets
☐ Eating disorders (bulimia, anorexia) ☐ Use of alcoholic beverages at least weekly
☐ Hoards food

ADL Patterns (Check all that apply)
☐ In bed clothes much of the day ☐ Practices good hygiene
☐ Wakens to toilet all or most nights ☐ Prefers grooming in AM
☐ Has irregular bowel movement pattern ☐ Reluctant to change clothing
☐ Showers for bathing ☐ Fear of water
☐ Baths in PM

Involvement Patterns (Check all that apply)
☐ Finds strength in faith ☐ Many friends and companions
☐ Daily animal companion presence ☐ Visits per phone
☐ In involved in group activities ☐ Daily close contacts with relatives or friends
☐ Loner, prefers seclusion ☐ Usually attends church, temple, etc. (TV Services)
☐ Territorial, draws boundaries

Bed Mobility and Transfer (Check only one)
☐ Applicant is independent with getting in and out of bed
☐ Applicant needs one person to assist getting in and out of bed
☐ Applicant needs two people to assist getting in and out of bed

Eating (Check only one)
☐ Applicant is independent when eating, and needs no assistance
☐ Applicant needs some assistance with eating (set-up of food, cueing)
☐ Applicant needs to be fed
Does applicant use any adaptive equipment? ☐ No ☐ Yes If so, what is used? ______________________

Does resident have a history of dysphagia? ☐ No ☐ Yes If so, explain: ______________________

Is resident on a special diet involving variance in food and liquid consistency? ☐ No ☐ Yes If so, explain: ______________________
PERSONAL PROFILE / RESIDENT INFORMATION

Veteran’s Name: ________________________________ Date of Birth: ____________

Birthplace: ________________________________ Primary Language: __________

DIRECTIONS: Please provide a Social History of Applicant from birth to present that includes but not limited to the following:

Family History- List of Siblings in birth order, Parents names with relationships and experiences.

Parent’s Occupations ____________________________________________________________

Family Pets ____________________________________________________________________

Mental Health History ____________________________________________________________

Number of Marriages, Children, Etc. ______________________________________________

Things Loved and Hated ______________________________________________________________________

Former Lifetime Occupations ________________________________________________________

Places Traveled ________________________________________________________________________

Foods Liked and Disliked ____________________________________________________________

Musical Tastes ________________________________________________________________________

Hobbies ______________________________________________________________________________

Clubs and Organizations belonged to ______________________________________________________________________

Church Preferences and Holidays Celebrated ____________________________________________

Current Interests and Activities (Any Prizes and Awards received in life) ____________________

Highest Level of Education _____________________________________________________________

Personality __________________________________________________________________________

Traumas and/or Tragedies in Life ________________________________________________________
ASSISTIVE DEVICES USED FOR DAY-TO-DAY FUNCTIONING OR MOBILITY/WALKING

Please check below for any applicable assistive devices used for day-to-day functioning or mobility/walking:

☐ Glasses  ☐ Wheelchair
☐ Hearing Aids  ☐ Motorized Conveyance
☐ Dentures  ☐ Wheel chair cushion, Who Provided? ______________________
☐ Cane  ☐ Other: ______________________
☐ Artificial limbs  □ Other: ______________
☐ Crutches
☐ Walker

☐ Wheelchair cushion, Who Provided? ______________________
☐ Other: ______________

Please describe any checked items above in detail, and explain how long they have been in use:
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

How many feet has the applicant been able to walk in the last 60 days (with or without assistive device(s))? _____________________________

Does the applicant have a history of falls or balance issues in the last year? ☐ No ☐ Yes If so, please describe history. _____________________________
______________________________________________________________________________
______________________________________________________________________________

Has the applicant received any physical, occupational, or speech therapy in the past? ☐ No ☐ Yes If so, please describe history. _____________________________
______________________________________________________________________________
______________________________________________________________________________

Name of Applicant: ______________________________________________________

Name and Phone Number of Contact: __________________________________________

Date: _____________________________

Note: ALL MOTORIZED/ELECTRICAL EQUIPMENT MUST BE CERTIFIED BY OUR MAINTANANCE DEPARTMENT BEFORE BEING PLACED IN RESIDENT’S ROOM.

Individual Completing Form: _____________________________ Date: _____________________________

Relationship to Applicant: _____________________________
INCOME TAX STATEMENT FORM

Name: _________________________________________________________

Date: __________________________________________________________

This is to certify that the above named Veteran and applicant for admission did not
file Federal Taxes for the preceding year(s) of
___________________________________________________________

Reason Federal Taxes not filed: ________________________________

Signature: ________________________________

Relationship to Veteran: ________________________________
REQUEST FOR COPY OF TAX RETURN

Form 4506-T
Request for Transcript of Tax Return

Do not sign this form unless all applicable lines have been completed.

> Request may be rejected if the form is incomplete or illegible.

> For more information about Form 4506-T, visit www.irs.gov/form4506t.

Tip. Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Get a Tax Transcript..." under "Tools" or call 1-800-908-9946. If you need a copy of your return, use Form 4506, Request for Copy of Tax Return. There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first.

1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)

2a If a joint return, enter spouse’s name shown on tax return.

2b Second social security number or individual taxpayer identification number if joint tax return

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)

4 Previous address shown on the last return filed if different from line 3 (see instructions)

5 If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party’s name, address, and telephone number.

Caution: If the transcript is being mailed to a third party, ensure that you have filled in lines 6 through 9 before signing. Sign and date the form once you have filled in these lines. Completing these steps helps to protect your privacy. Once the IRS discloses your tax transcript to the third party listed on line 5, the IRS has no control over what the third party does with the information. If you would like to limit the third party's authority to disclose your transcript information, you can specify this limitation in your written agreement with the third party.

6 Transcript requested. Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request.

   a Return Transcript, which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120-A, Form 1120-H, Form 1120-L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days.

   b Account Transcript, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 10 business days.

   c Record of Account, which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 10 business days.

7 Verification of Nonfiling, which is proof from the IRS that you did not file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days.

8 Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript. The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2011, filed in 2012, will likely not be available from the IRS until 2013. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 10 business days.

Caution: If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

9 Year or period requested. Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately.

Caution: Do not sign this form unless all applicable lines have been completed.

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. Note: This form must be received by IRS within 120 days of the signature date.

Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T. See instructions.

Signature (see instructions) Date

Sign Here
Title (If line 1a above is a corporation, partnership, estate, or trust) Date

Spouse’s signature Date

For Privacy Act and Paperwork Reduction Act Notice, see page 2.
Chart for all other transcripts

<table>
<thead>
<tr>
<th>State or City</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Ohio, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin</td>
<td>P.O. Box 9941 Mail Stop 6734 Ogden, UT 84409</td>
</tr>
</tbody>
</table>

Mail or fax to:

- Internal Revenue Service RAVS Team P.O. Box 145500 Stop 2800 F Cincinnati, OH 45250
- Internal Revenue Service RAVS Team P.O. Box 7067 P.R. F. 19800 Miami, FL 33131

Individuals. Transcripts of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506-T exactly as your name appeared on the original return. If you changed your name, also sign your current name.

Circumstances. Generally, Form 4506-T can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer. A bona fide shareholder of record owning 1 percent or more of the outstanding stock of the corporation may submit a Form 4506-T but must provide documentation to support the requester’s right to receive the information.

Partnerships. Generally, Form 4506-T can be signed by any partner who is a member of the partnership during any part of the tax period requested on line 9.

All others. See section 6103(e) if the taxpayer has died, is insolvent, is a dissolved corporation, or is a trustee, guardian, executor, receiver, or administrator who is acting for the taxpayer.

Note: If you are heirs at law, next of kin, or beneficiaries you must be able to establish a material interest in the estate or trust.

Documentation. For entities other than individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the letters testamentary authorizing an individual to act for an estate.

Signature by a representative. A representative can sign Form 4506-T for a taxpayer only if the taxpayer has specifically authorized his or her representative to sign the request to the representative on Form 2848, line 5. The representative must attach Form 2848 showing the delegation to Form 4506-T.

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to establish your right to gain access to the requested tax information under the Internal Revenue Code. We need this information to properly identify the tax information and respond to your request. You are not required to request any transcript; if you do request a transcript, sections 6103 and 6109 and their regulations require you to provide this information, including your SSN or EIN. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal non-tax criminal laws, or U.S. laws or enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be maintained as long as their contents may become material in the administration of any internal revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506-T will vary depending on individual circumstances. The estimated average time is:

- Learning about the law or the form, 10 min.;
- Preparing to file the form, 13 min.; and
- Copying, assembling, and sending the form to the IRS, 20 min.

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506-T simpler, we would be happy to hear from you. You can write to:

Internal Revenue Service Tax Forms and Publications Division 111 Constitution Ave., NW, IR-6260 Washington, DC 20224

Do not send the form to this address. Instead, see Where to file on this page.
### MEDICAL CERTIFICATION FOR MEDICAID LONG-TERM CARE SERVICES AND PATIENT TRANSFER FORM

**A. PATIENT INFORMATION**

* Patient Name: [Name]
* Gender: [ ] Male [ ] Female
* Hispanic Ethnicity: [ ] Yes [ ] No
* Race: [ ] White [ ] Black [ ] Other: [Other]
* Language: [ ] English [ ] Other:

**B. SIGHT HEARING**

- Normal [ ] Impaired [ ] Deaf [ ] Normal [ ] Impaired
- Blind [ ] Hearing Aid [ ] Other:

**C. DECISION MAKING CAPACITY (PATIENT)**

- Capable to make healthcare decisions [ ] Requires a surrogate [ ]

**D. EMERGENCY CONTACT**

- Name: [Name]
- Phone: [Phone]

**E. MEDICAL CONDITION**

* Primary diagnosis: [ ]
* Other diagnoses: [ ]

If hospitalized:
- Primary diagnosis at discharge: [ ]
- Reason for transfer: [ ]
- Surgical procedures performed: [ ]

**F. INFECTION CONTROL ISSUES**

- PPD Status: [ ] Positive [ ] Negative [ ] Not known
- Screening date: [ ]
- Associated Infections/resistant organisms:
  - MRSA [ ] Site: [Site]
  - VRE [ ] Site: [Site]
  - ESBL [ ] Site: [Site]
  - MDRO [ ] Site: [Site]
  - C-Diff [ ] Site: [Site]
  - Other: [Site]
- Isolation Precautions: [ ] None
- Contact: [ ] Droplet [ ] Airborne

**G. PATIENT RISK ALERTS**

- *None Known [ ]*
- *Harm to self [ ]* Difficulty swallowing [ ]
- *Elopement [ ]* Harm to others [ ] Seizures [ ]
- *Pressure Ulcers [ ]* Falls [ ] Other: [Other]

**RESTRANTS:** [ ] Yes [ ] No

Types: [ ]

Reasons for use: [ ]

**ALLERGIES:** [ ] None Known [ ] Yes, List below:

- Latex Allergy: [ ] Yes [ ] No Dye Allergy/Reaction: [ ] Yes [ ] No

**H. ADVANCE CARE PLANNING**

Please ATTACH any relevant documentation:
- Advance Directive [ ] Yes [ ] No
- Living Will [ ] Yes [ ] No
- DO NOT Resuscitate (DNR) [ ] Yes [ ] No
- DO NOT Intubate [ ] Yes [ ] No
- DO NOT Hospitalize [ ] Yes [ ] No
- No Artificial Feeding [ ] Yes [ ] No
- Hospice [ ] Yes [ ] No

**I. TRANSFERRED FROM**

- Facility Name: [ ]
- Date: [ ]
- Unit: [ ]
- Phone: [ ]
- Fax: [ ]
- Discharge Nurse: [ ]
- Admit Date: [ ]
- Admit Time: [ ]
- Discharge Date: [ ]
- Discharge Time: [ ]

**J. TRANSFERRED TO**

- Facility Name: [ ]
- Address 1: [ ]
- Address 2: [ ]
- Phone: [ ]
- Fax: [ ]

**K. PHYSICIAN CONTACTS**

- Primary Care Name: [ ]
- Phone: [ ]
- Hospitalist Name: [ ]
- Phone: [ ]

**L. TIME SENSITIVE CONDITION SPECIFIC INFORMATION**

Medication due near time of transfer / list last time administered:

- Anticoagulants [ ] Yes [ ] No
- Blood thinners [ ] Yes [ ] No
- Antihypertensive [ ] Yes [ ] No
- Insulin [ ] Yes [ ] No
- Other: [ ]

Other medications:

Has CHF diagnosis: [ ] Yes [ ] No
- If yes: new/worsened CHF present on admission? [ ]
- Last echocardiogram: Date: [ ]

On a proton pump inhibitor? [ ] Yes [ ] No
- If yes, was it for: [ ] In-hospital prophylaxis and can be discontinued [ ]

Specific diagnosis:

- On one or more antibiotics? [ ] Yes [ ] No
- If yes, specify reason(s):
- Any critical lab or diagnostic test pending at the time of discharge? [ ] Yes [ ] No

**M. PAIN ASSESSMENT**

Pain Level (between 0 - 10):

Last administered: Date: [ ]

**N. FOLLOWING REPORTS ATTACHED**

- Physicians Orders [ ]
- Treatment Orders [ ]
- Discharge Summary [ ]
- Includes Wound Care [ ]
- Medication Reconciliation [ ]
- Lab reports [ ]
- Discharge Medication List [ ]
- X-ray [ ]
- EKG [ ]
- PASRR Forms [ ]
- CT Scan [ ]
- MRI [ ]
- Social and Behavioral History [ ]
- History & Physical [ ]
- All Medications: [ ]

*AHCA Form 5000-3008, (JUN 2016) Incorporated by reference in Rule 59G-1.045, F.A.C.*

*Data required for Medicaid*
MEDICAL VERIFICATION OF CAPACITY OR INCAPACITY TO GIVE INFORMED CONSENT AND OR MAKE MEDICAL DECISIONS UPON ADMISSION OR FROM A CHANGE IN CONDITION

I, Dr. _____________________________, the attending / referring physician for _____________________________, a potential or current resident at Clyde E. Lassen SVNH have evaluated my patient on ____/____/____, and determined that he/she _____ HAS or _____ LACKS capacity to make informed consent and/or medical decisions due to the following conditions:

____________________________________________________________________

Attending/Referring Physician Signature ____________________ Date ______________

This determination is being made as part of the medical record for the purpose of:

1. Initiating the resident’s Living Will
2. Commencing and delegating the authority of the resident’s Health Care Surrogate
3. Designating a Health Care Proxy for the resident
4. Signing Admission documents to a skilled nursing facility
INFORMED CONSENT FORM

CLIENT’S NAME: ________________________________________________

DATE OF BIRTH: ________________________________________________

An assessment is required for all persons applying for or receiving assistance for long-term care. This includes the Institutional Care Program (ICP) and Home and Community-Based Services (HCBS) waiver programs.

In order to evaluate my needs, I am giving my consent to the following:

- I agree to an assessment to identify my need for long-term care, and to determine if my needs can be met in the community instead of a nursing facility.

- I authorize DOEA staff to access my medical records. I understand and agree that DOEA may need to talk to my doctor and other health professionals. I also understand that they may need to interview my family members, close friends and social services professionals about my situation.

________________________________________________________________________
Individual or Representative

________________________________________________________________________
Relationship (if representative signs)

________________________________________________________________________
Date

AHCA--Med Serv 2040, May 2008
State of Florida
DO NOT RESUSCITATE ORDER
(please use ink)

Patient’s Full Legal Name: __________________________ Date: ______________________
(Print or Type Name)

PATIENT’S STATEMENT
Based upon informed consent, I, the undersigned, hereby direct that CPR be withheld or withdrawn.
(If not signed by patient, check applicable box):

☐ Surrogate  ☐ Proxy (both as defined in Chapter 765, F.S.)
☐ Court appointed guardian  ☐ Durable power of attorney (pursuant to Chapter 709, F.S.)

(Applicable Signature)  (Print or Type Name)

PHYSICIAN’S STATEMENT
I, the undersigned, a physician licensed pursuant to Chapter 458 or 459, F.S., am the physician of the patient named above. I hereby direct the withholding or withdrawing of cardiopulmonary resuscitation (artificial ventilation, cardiac compression, endotracheal intubation and defibrillation) from the patient in the event of the patient’s cardiac or respiratory arrest.

(________) _______ - _______  (Signature of Physician)  (Date)  Telephone Number (Emergency)

(Print or Type Name)  (Physician’s Medical License Number)

DH Form 1896, Revised December 2004
HEALTH CARE ADVANCED DIRECTIVES
The Patient’s Right to Decide

The following information is being provided from the Agency for Healthcare Administration:
www:ahca.myflorida.com/mchq

Introduction
Every competent adult has the right to make decisions concerning his or her own health, including the right to choose or refuse medical treatment.

When a person becomes unable to make decisions due to a physical or mental change, such as being in a coma or developing dementia (like Alzheimer’s disease), they are considered incapacitated. To make sure that an incapacitated person’s decisions about health care will still be respected, the Florida legislature enacted legislation pertaining to health care advance directives (Chapter 765, Florida Statutes). The law recognizes the right of a competent adult to make an advance directive instructing his or her physician to provide, withhold or withdraw life-prolonging procedures, to designate another individual to make treatment decisions if the person becomes unable to make his or her own decisions and/or to indicate the desire to make an anatomical donation after death.

By law hospitals, nursing homes, home health agencies, hospices and health maintenance organizations (HMOs) are required to provide their patients with written information, such as this pamphlet, concerning health care advance directives. The state rules that require this include 58A-2.0232, 59A-3.254, 59A-4.106, 59A-8.0245 and 59A-12.013, Florida Administrative Code.

Questions About Health Care Advance Directives

What is an advance directive?
It is a written or oral statement about how you want medical decisions made should you not be able to make them yourself. It can also express your wish to make an anatomical donation after death. Some people make advance directives when they are diagnosed with a life-threatening illness and others put their wishes into writing while they are healthy, often as part of their estate planning.

Three types of advance directives are:
• A Living Will
• A Health Care Surrogate Designation
• An Anatomical Donation

You might choose to complete one, two or all three of these forms. This pamphlet provides information to help you decide what will best serve your needs.

What is a living will?
It is a written or oral statement of the kind of medical care you want or do not want if you become unable to make your own decisions. It is called a living will because it takes effect while you are still living. You may wish to speak to your health care provider or attorney to be certain you have completed the living will in a way that your wishes will be understood.

What is a health care surrogate designation?
It is a document naming another person as your representative to make medical decisions for you if you are unable to make them yourself. You can include instructions about any treatment you want or do not want, similar to a living will. You can also designate an alternate surrogate.

Which is best?
Depending on your individual needs you may wish to complete any one or a combination of the three types of advance directives.

What is an anatomical donation?
It is a document that indicates your wish to donate at death, all or part of your body. This can be an organ and tissue donation to persons in need, or donation of your body for training of health care workers. You can indicate your choice to be an organ donor by designating it on your driver’s license or state identification card (at your nearest driver’s license office), signing a uniform donor form (seen elsewhere in this pamphlet) or expressing your wish in a living will.
Am I required to have an advance directive under Florida law?
No, there is no legal requirement to complete an advance directive. However, if you have not made an advance directive, decisions about your health care or an anatomical donation may be made for you by a court-appointed guardian, your wife or husband, your adult child, your parent, your adult sibling, an adult relative or a close friend. The person making decisions for you may or may not be aware of your wishes. When you make an advance directive and discuss it with the significant people in your life, it will better assure that your wishes will be carried out the way you want.

Must an attorney prepare the advance directive?
No, the procedures are simple and do not require an attorney, though you may choose to consult one. However, an advance directive, whether it is a written document or an oral statement, needs to be witnessed by two individuals. At least one of the witnesses cannot be a spouse or a blood relative.

Where can I find advance directive forms?
Florida law provides a sample of each of the following forms: a living will, a health care surrogate and an anatomical donation. Elsewhere in this pamphlet are included sample forms as well as resources where you may find more information and other types of advance directive forms.

Can I change my mind after I write an advance directive?
Yes, you may change or cancel an advance directive at any time. Any changes should be written, signed and dated. However, you may also change an advance directive by oral statement; physical destruction of the advance directive or by writing a new advance directive. If your driver’s license or state identification card indicates you are an organ donor but you no longer want this designation, contact the nearest driver’s license office to cancel the donor designation and a new license or card will be issued to you.

What if I have filled out an advance directive in another state and need treatment in Florida?
An advance directive completed in another state, as described in that state’s law, may be honored in Florida.

What should I do with my advance directive if I choose to have one?
- If you designate a health care surrogate and an alternate surrogate be sure to ask them if they agree to take this responsibility, discuss how you would like matters handled and give them a copy of the document.
- Make sure that your health care provider, attorney, and the significant persons in your life know that you have an advance directive and where it is located. You also may want to give them a copy.
- Set up a file where you keep a copy of your advance directive (and other important paperwork). Some people keep original papers in a bank safety deposit box. If you do, you may want to keep copies at your house or information concerning the location of your safety deposit box.
- Keep a card or note in your purse or wallet that states that you have an advance directive and where it is located.
- If you change your advance directive, make sure your health care provider, attorney and the significant persons in your life have the latest copy.

If you have questions about your advance directive you may want to discuss these with your health care provider, attorney or the significant persons in your life.

Additional Information Regarding Health Care Advance Directives
Before making a decision about advance directives you might want to consider additional options and other sources of information, including the following:

- As an alternative or in addition to a health care surrogate, you might want to designate a durable power of attorney. Through a written document you can name another person to act on your behalf. It is similar to a health care surrogate, but the person can be designated to perform a variety of activities (financial, legal, medical, etc.). You may consult an attorney for further information or read Chapter 709, Florida Statutes.

If you choose someone as your durable power of attorney be sure to ask the person if he or she will agree to take this responsibility, discuss how you would like matters handled, and give the person a copy of the document.
If you are terminally ill (or if you have a loved one who is in a persistent vegetative state) you may want to consider having a pre-hospital Do Not Resuscitate Order (DNRO). A DNRO identifies people who do not wish to be resuscitated from respiratory or cardiac arrest. The pre-hospital DNRO is a specific yellow form available from the Florida Department of Health (DOH). Your attorney, health care provider or an ambulance service may also have copies available for your use. You, or your legal representative and your physician sign the DNRO form. More information is available on the DOH website, www.doh.state.fl.us or www.MyFlorida.com (type DNRO in these website search engines) or call (850) 245-4440.

If you are admitted to a hospital the pre-hospital DNRO may be used during your hospital stay or the hospital may have its own form and procedure for documenting a Do Not Resuscitate Order.

If a person chooses to donate, after death, his or her body for medical training and research the donation will be coordinated by the Anatomical Board of the State of Florida. You, or your survivors must arrange with a local funeral home and pay for a preliminary embalming and transportation of the body to the Anatomical Board located in Gainesville, Florida. After being used for medical education or research, the body will ordinarily be cremated. The remains will be returned to the loved ones, if requested at the time of donation or the Anatomical Board will spread the remains over the Gulf of Mexico. For further information contact the Anatomical Board of the State of Florida at (800) 628-2594 or visit their website at www.med.ufl.edu/anatbd.

If you would like to read more about organ and tissue donation to persons in need you can view the Agency for Health Care Administration’s website at www.fdhc.state.fl.us (Click on “Site Index,” then scroll down to “Organ Donors”) or the federal government site www.organdonor.gov. If you have further questions you may want to talk with your health care provider.

Various organizations also make advance directive forms available. One such document is “Five Wishes” that includes a living will and a health care surrogate designation. “Five Wishes” gives you the opportunity to specify if you want tube feeding, assistance with breathing, pain medication and other details that might bring you comfort such as what kind of music you might like to hear, among other things. You can find out more at:

Aging with Dignity
www.agingwithdignity.org
(888) 594-7437

Other resources include:

American Association of Retired Persons (AARP)
www.aarp.org
(Type “advance directives” in the website’s search engine)
Partnership for Caring
www.partnershipforcaring.org
(800) 989-9455

Your local hospital, nursing home, hospice, home health agency and your attorney or health care provider may be able to assist you with forms or further information.

Brochure: End of Life Issues
www.FloridaHealthStat.com (Under Reports and Guides)
(888) 419-3456

Resident Standard Application Packet Revised 01/06/2020
FACILITY CHARACTERISTICS/LIMITATIONS

Special Characteristics:

This is a 120-bed facility providing skilled nursing care and can accommodate residents with dementia/Alzheimer’s disease. (Applies to all Facilities except Emory L. Bennett)

Service Limitations:

This facility will assess all potential and current residents, and determine admission or continued residency based on the facility’s ability to accommodate the needs of the resident.

This facility is a smoke-free campus