

Elements	Yes	No	Comments/Actions Required
Need:			
Appropriate deposits			
Irrevocable			
Remainder at death to DCH			
Established by A/R, guardian, POA			
Forms:			
Guide to Trustees, Worksheet, certification, templates			
QIT requirements:			
Acceptable document			
Form 285 sent appropriately or QIT to DCH legal			
Certification completed			
Verify income being deposited into QIT account			
Were deposits made each month timely and accurately			
Other:			
Was appropriate action taken if guidelines not met			
Appropriate notification and actions if A/R has died			
No change in trustee			
Income under the Medicaid cap			
Timely 6 month QIT review(s)			
QIT Account:			
Appropriate account established			
Account only for QIT - no commingled funds			
Treatment of Income:			
Not directly deposited			
Appropriate amount deposited (all or minimum)			
Timely funded			
Appropriate and Timely disbursements			
If diversion, correct amount			
Funds entering or leaving QIT:			
Any deposits other than the monthly income			
Any disbursements other than PNA, diversion, PL/CS, medical (IMEs)			
Any change in monthly deposit, is it appropriate			