

Care Home Admission Checklist

Moving into a care home involves a lot of preparation. Use this checklist to ensure you have all the necessary documents and information ready for the financial assessment and admission process.

Personal Documents

- ☐ Birth Certificate
- ☐ Marriage/Civil Partnership Certificate
- ☐ National Insurance Number
- ☐ Passport or Driving Licence (for ID)
- ☐ Power of Attorney documents (Enduring or Lasting)

Financial Information (Income)

- ☐ State Pension details (letter from Social Security Agency)
- ☐ Private/Occupational Pension statements
- ☐ Pension Credit award letter
- ☐ Attendance Allowance / DLA / PIP award letters
- ☐ Details of any other benefits

Financial Information (Capital & Assets)

- ☐ Bank statements for all accounts (last 3-6 months)
- ☐ Building society passbooks
- ☐ Post Office / National Savings certificates
- ☐ Premium Bonds certificates
- ☐ Stocks, shares, and unit trust certificates
- ☐ Details of any property owned (deeds, valuation)

Expenditure Details

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- ☐ Council Rates bill
- ☐ Ground rent or service charges
- ☐ Life assurance policies
- ☐ Funeral plan details