



MEDICAID APPLICATION DOCUMENT CHECKLIST

Please gather as many of the following documents as you can and bring them to us before your initial conference. We will scan these documents during the conference.

**** If the Medicaid Applicant is married, we will need this information for both spouses.****

General Information:

- Birth Certificate
- Marriage certificate(s) for most recent marriage
- Any decree of dissolution of marriage of the Applicant
- Death Certificate of any deceased spouse of the Applicant
- Social Security Identification Card
- Railroad Retirement Card
- Driver's License or Identification Card
- Most recent federal income tax return

Nursing Home Information:

- Nursing Home admission documents
- Statement, letter, or invoice from nursing home showing Applicant's daily rate
- Hospital admission and discharge documents if Applicant was in the hospital prior to nursing home

Insurance Information:

- Medicare Card
- Veterans health benefit card and statement
- Supplemental Health Insurance Card
- Supplemental Health Insurance Premium Statement

- Rx (prescription) Plan Card
- Rx (prescription) Plan Premium Statement
- Long term care (nursing home) insurance policy with fact sheet

Income Information:

- Social Security Statement (usually comes in the fall of the year)
- Railroad Benefits Statement
- Veteran's Benefits Statement
- Pension Statement
- Farm Lease, and income information
- Rental Property Lease, income information and expenses of ownership:
 - Real estate tax statements
 - Property insurance statement
 - Utility statement
 - Maintenance expenses
 - Mortgage information
- Earnings: name of employer, pay stubs covering the last 3 months, verification of work expenses.
- Statements regarding any other income received.

Resource Information:

- Account Statements showing the balance of any and all accounts owned **for three months prior to the initial conference**. Such accounts include:
 - Checking Accounts
 - Savings Accounts
 - Certificates of Deposit (CD)
 - Stocks
 - Bonds (including US savings bonds or any other type of bond)

- Securities
- Investment accounts
- Brokerage accounts
- IRA and or 401K accounts
- Other Retirement Accounts
- Nursing Home resident account

Life insurance Documents:

- Policy
- Face Sheet showing issue date and face amount
- Any document showing cash surrender value

Annuity policies or contracts

Vehicle documents ((includes cars, trucks, RVs, camper trailer, boats, motorcycles etc.)

- Vehicle Title
- A note from you describing vehicle make, model, condition, and current mileage of the vehicle.

Real Estate documents, whether owned individually, jointly with others, or in trust

- Deeds
- Appraisals (only if you already have them)
- Real Estate Tax Statements

Prepaid funeral documents and deed to burial plot.

A list of the contents of any safety deposit box, the name of the bank and the bank's location.

Gifts and Transfers:

- Evidence of gifts to family members or any other persons or entities, such as copies of checks, account statements, and deeds for the past 5 years

Legal Documents:

- Powers of Attorney

- Appointment of Health Care Representative
- Last Will and Testament
- Trust Agreement(s)
- Living Will
- If person in under Guardianship, “Letters of Guardianship” and/or Court Order

Provide the following information only if the nursing home resident has a spouse living at home:

- Records of the following household expenses for the past three months:
 - Rent or Mortgage payment
 - Real Estate Taxes
 - Homeowner’s insurance premium
 - Condo maintenance fees or charges
 - Telephone Bill
 - Gas Bill
 - Electric Bill
 - Water Bill
 - Sewage Bill
 - Fuel Oil Bill
 - Trash Bill

The Medicaid application process takes a lot of time and requires an extremely large volume of documentation. If the person that you are helping resides in a nursing home, please tell the nursing home representative that your attorney is gearing up for the application process and ask the representative to direct Medicaid questions to your attorney.



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