

## **MEDICAID CHECKLIST OF DOCUMENTS**

1. **Birth Certificate**
2. **Marriage License**
3. **Health-Insurance Provider Card**
4. **Social Security Card**
5. **Real Estate Deed**
6. **Real Estate Tax Bill** (summer/winter)
7. **Income/Social Security:** Copy of social security check or copy of bank statement showing direct deposit, or new benefit statement received at beginning of each new year.
8. **Income/Pensions:** Copy of complete pension check, including pay stub or letter from company showing gross, deductions and net of monthly pension received.
9. **Veteran's Benefits:** Copy of verification of monthly Veteran's amount received.
10. **Bank Accounts:** Current copy of bank statement for any and all bank accounts (certificates of deposit, etc.).
11. **Snap Shot Date:** (Applies to married couples only). Please provide balance for ALL assets on date of admission to hospital or nursing home, whichever was the first period of continuous care for more than 30 days after leaving home. This is the date Medicaid will value the assets to determine how much, if any, the community spouse may keep from the hospitalized spouse.
12. **Brokerage Accounts:** Current copy of statement (quarterly or monthly) for all brokerage accounts showing title and ownership of account.
13. **Savings Bonds:** Copies of all savings bonds
14. **Stocks:** Copies of all stock certificates
15. **Life Insurance:** Copy of all policies specifically showing face value and beneficiary information. If there is a TERM policy, provide a letter from company that verifies there is NO cash surrender value to the policy.
16. **Prepaid Burial:** Copy of Irrevocable contract
17. **Burial Plot:** Copy of cemetery certificate
18. **Burial Account:** Copy of latest statement or passbook showing title of account for burial purposes only.

19. **Transfer/Divestment:** Copy of verification showing date of transfer/divestment, i.e. bank statement or passbook, cancelled checks, etc.
20. **Trust:** Copy of trust agreement
21. **Estate Plan Documents:** Copy of all estate plan documents, i.e. Wills, Powers of Attorney, Patient Advocate Designations.
22. **Annuity:** Copy of annuity contract
23. **Expenses:** Copies of mortgage statement, home equity loan statement, homeowner's insurance statement, condo fee statement, utility bill, property tax bill (summer/winter).
24. **Motor Vehicle:** Copy of title/registration
25. **Proof of Health Insurance Premiums:** Cancelled check, direct withdrawal from account or recent letter from insurance company.

**NOTE: IF THE INDIVIDUAL IS MARRIED, WE WILL NEED ALL THE SAME INFORMATION REGARDING THE INDIVIDUAL'S SPOUSE.**