

MEDICAID DOCUMENT CHECKLIST

The following is a list of items needed from the applicant and spouse (if applicable) to determine eligibility for public assistance. You may need to provide additional information not listed below. If you cannot get all of the information requested, please contact our office as soon as possible in order to determine other means of documentation that may suffice.

- _____ Copy of one valid photo ID for applicant and/or spouse
- _____ Copy of birth certificate for applicant and/or spouse
- _____ Copy of Social Security card for applicant and/or spouse
- _____ Copy of Medicare card for applicant and/or spouse
- _____ Copy of any other health insurance card (front and back) for applicant and/or spouse
- _____ Copy of alien registration or naturalization papers (if applicable) for applicant and/or spouse
- _____ Copy of armed service records for applicant and/or spouse
- _____ Copy of premium notice for any health insurance other than Medicare for applicant and/or spouse
- _____ Verification of **gross** income, such as Social Security, pensions, disability, unemployment compensation, worker's compensation, etc. for applicant and/or spouse
- _____ Copy of deed to any property owned by applicant and/or spouse
- _____ Copy of proof of outstanding mortgage balance for applicant and/or spouse
- _____ Copy of title and/or registration for all cars, boats, mobile homes, etc. owned by applicant and/or spouse
- _____ Copy of deed to burial plots for applicant and/or spouse
- _____ Copy of pre-arranged funeral contract confirming their value for applicant and/or spouse
- _____ Copies of most recent **THREE** bank statements, in their entirety, for all accounts (including CD's) titled in applicant's and/or spouse's name; and most recent. asset account statements (IRA, Annuity, etc)
- _____ Copies of all check registers.
- _____ Copy of life insurance policies with verification of face and cash values for applicant and/or spouse
- _____ Copy of closing statements for any accounts closed within the last five years with verification of how closing proceeds were distributed for applicant and/or spouse
- _____ Copy of estate planning documents including will, durable power of attorney, living will, and health care power of attorney for applicant and/or spouse

- _____ **MARRIED INDIVIDUAL ONLY**
Verification of community property expenses such as electric bill, gas bill, water bill, homeowners insurance, month rent, property taxes, & association fees.

** Please be advised that further documentation may be required to show all eligibility requirements have been met **