

Target date for eligibility: \_\_\_\_\_

Waiver or Nursing Home: \_\_\_\_\_

### **MEDICAID APPLICANT CHECKLIST**

All Medicaid applications must be accompanied by documents verifying eligibility. No Medicaid application can be approved without all the applicable documentation. **Below is a list of documents that must be supplied for the applicant and his or her spouse.** Please remember, it is better to provide us with too much documentation rather than too little.

- 1. Copy of Social Security Card. (applicant AND spouse)
- 2. Copy of Medicare Card. (applicant AND spouse)
- 3. Copy of birth certificate. (applicant AND spouse)
- 4. Copy of Marriage Certificate/Death Certificate/Divorce Decree
- 5. Copy of supplemental health insurance cards and prescription drug plan cards. (front and back) (applicant AND spouse)
- 6. Copy of any document verifying health insurance and prescription drug plan premiums.
- 7. Copy of vehicle titles or registrations.
- 8. Copy of bank statements for all accounts dating back three (3) months. Please include copies of checks if provided with bank statements and all blank pages.
- 9. Copy of account statements from any other financial accounts held.
- 10. Copy of any life insurance policies owned by either spouse. Please include all policies owned, even if insuring children, grandchildren, or others.
- 11. Copy of check stubs or deposit notification from all pensions to verify gross income and to demonstrate whether any taxes are withheld. A notation on the bank statement is not acceptable verification.
- 12. Copy of the current year Social Security Benefit Notice. A notation on the bank statement is not acceptable verification.
- 13. Copy of documents verifying other income received.
- 14. Copy of receipts from medical expenses (i.e. doctor's bills, pharmaceutical receipts, and other medical expenses for the applicant).
- 15. Copy of any mortgage statements.
- 16. Copy of any deeds to all property owned by either spouse.
- 17. Copy of current property tax statement.
- 18. Copy of home owner's insurance statement.
- 19. Copy of electric, heat, water, and all other utility bills.
- 20. Copy of applicant's last income tax returns.
- 21. Copy of Power of Attorney/Letters of Guardianship.
- 22. Copy of Health Care Representative.
- 23. Copy of Last Will and Testament/Trust.
- 24. Copy of Funeral Trust Plan, including goods and services page.
- 25. Copy of CCB for Waiver clients.

Date: \_\_\_\_\_