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MEDICAID APPLICATION CHECKLIST

***Please provide copies of the following documents for the person applying for Medicaid and the applicant's spouse.**

PERSONAL INFORMATION

- Driver's License/Photo ID Card
- Social Security Card
- Birth Certificate
- Marriage Certificate
- Medicare Card/any other Health Insurance Card
- Registered Alien Cards, I94 Card or Naturalization Paper

RESIDENCY

- Deed
- Rent Receipt, Lease Agreement or Landlord Statement
- Nursing Home Bill

RESOURCES

- Bank Accounts (Checking/Savings/CD's) - statements showing all transactions for 60 months (5 years)
- Annuities/IRA's - statements showing all transactions for 60 months/5 years
- Investment/Mutual Fund Accounts - statements showing all transactions for 60 months/5 years
- Stocks - statements showing all transactions for 60 months/5 years
- Trust Accounts - statements showing all transactions for 60 months/5 years

***The above statements are needed for all accounts open during past 60 months, EVEN IF THE ACCOUNT IS NOW CLOSED.**

- Life Insurance statement(s) showing current face value and cash value
- Vehicle registration(s)
- Burial Agreement showing Irrevocable Burial Account established at bank
- Deed to Cemetery Plot
- For Rental Property owned by applicant or applicant's spouse: Deed and recent tax bills, mortgage statement and insurance statement

INCOME

- Social Security check/SSI check and/or current award letter
- Veteran's benefit(s): current statement showing gross and net amount
- Pension(s): current statement showing gross and net amount
- NYS Disability: current statement showing gross and net amount
- Child Support/Alimony verification
- Verification of any other type of income received such as IRA's, Annuities, stock dividends, interest payments, income from lease or sale of property, etc.
- Rental Property: income and expense statement for past prior year
- Most current 8 week pay stubs/employer's statement which give gross pay and deductions
- Copy of Federal Income Tax Returns for past 5 years

MEDICAL

- All outstanding medical bills
- Receipts for all medical bills and prescriptions paid within last 3 months from date of contact
- Verification of health insurance premium(s)

OTHER

- Power of Attorney
- Trust Agreement
- Death Certificate of Spouse
- Separation/Divorce Papers
- Veteran's Discharge/Separation Papers
- Child Support/Alimony expense verification