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Medicaid Documentation Checklist

We recommend that you have the following items gathered and available when applying for Medicaid. Applications and items needed vary by individual, and as such this list may not include all items that Medicaid requests, however these are the most commonly requested items.

Authority Documents

_____ Power of Attorney / Letters of Guardianship, if applicable

Identification Documents

_____ Birth Certificate / Proof of Citizenship / Proof of Alien Status

_____ Driver's License

_____ Social Security Card

Medical Documents

_____ Medicare Card

_____ Secondary Medical Insurance Card(s)

_____ Other Medical Insurance Card(s)

_____ Unpaid Medical Bills

Financial Documents

Asset Documents

_____ Bank Statements for last 3 months for any checking, savings, CD, money market, etc., on all accounts for which the individual appears solely or jointly

_____ Brokerage account(s), stocks, bonds or IRA statements showing values and last dividend or interest payment

_____ Proof of Annuities, such as last annual statement

_____ Life Insurance Policies with cash value, need cash value, face value, and most recent annual statement

Income Documents

_____ Proof of Social Security Benefits – most recent Social Security letter, and/or letter sent in December showing next year's payment amount

_____ Proof of VA Income – original award letter or current letter from VA, note: Aid & Attendance amounts must be shown separately

_____ Proof of Pension deposit – pay stub or letter from pension administrator with amount and frequency of payment

_____ Proof of other income sources, if applicable

_____ If self-employed, need income verification such as last year's tax return

Funeral / Burial Documents

_____ Pre-paid funeral, burial, or cremation agreement (copy only), contract needs to be irrevocable

_____ Burial Plot / Cemetery Lot – contract and proof of plot / lot

Real Property Documents

_____ Proof of property owned (house, mobile home, lot, etc.) – deed, registration or most recent tax assessment for any real property solely or jointly owned by the individual applying

_____ Amount owed on mortgage, such as the most recent mortgage statement

_____ Proof of property for sale - listing and fair market value, may be obtained from realtor

Vehicle Documents

_____ Year, make, model, and copy of title (not original) for automobile

_____ Year, make, model, and copy title (not original) for boat or additional automobiles

Medicaid Forms

Note: AGED will provide the following forms

_____ Designated Representative, if applicable

_____ Financial Release Authorization

_____ Medical Records Release

Trust Documents

Note: AGED will provide the following forms

_____ DCF / SSA Regs *provided with AGED Welcome Letter

_____ Joinder Agreement

_____ Joinder Addendum, if applicable

_____ Master Trust

_____ Receipt of trust funding

_____ Trust statements for last 3 months or less if trust opened less than 3 months ago