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