

DOCUMENTS REQUIRED FOR DETERMINATION OF ELIGIBILITY FOR MEDICAID

Please follow this list of documentation and check to the left the items that you are able to obtain. In addition, if it is an item that does not pertain, please indicate with a NA, and if it is a document that was once in your possession and now lost, please indicate with an L.

NAME OF APPLICANT: _____

NAME OF PERSON COMLETING ELIGIBILITY FORM: _____

DATE: _____

A. Proof of identity (2):

- . Social Security card
- Drivers license
- . Birth or Baptismal Certificates
- . Military Discharge Papers
- . Marriage Certificate
- . Death Certificate of Spouse

B. Citizenship (1)

- Certificate of Naturalization
- Passport and/or Visa
- Alien registration card
- Voter registration card

C. Marriage Status (1)

- Marriage certificate
- Legal separation agreement
- Divorce Decree
- Spouses Death certificate

D. Residence

- Deed, lease or rent receipt

E. Income

- Pay stubs
- Copy of latest social security check

- Pension check
- Dividends, annuities

F. Resources – anything with your or your spouse's name on it

- Property currently owned/owned + assessed value of property
- Bank statements
- Stocks, bonds, annuities
- Investments/brokerage funds
- Certificate of Deposits (CD's)
- IRA's, 40k
- Trust agreements
- Include any accounts/resources which may have been closed, cashed in, or transferred
- Income tax returns, including 1099's
- Summary of any payments made to a nursing home, even if a short term stay
- Verification and clarification of any withdrawals or deposits over \$1,000 (copy of cancelled checks)

G. Life Insurance

- Copy of policy and verification of its cash value
- Policy owner and number

H. Health Insurance

- Medicare Card
- Other identification cards for health insurance + premiums
- Proof of Payment

I. Veterans

- Military Discharge papers for applicant and spouse

J. Other Documents

- Copy of signed POA
- Signed Authorization to represent form
- Guardianship papers
- Irrevocable Burial trust/preneed agreement