

REQUIRED VERIFICATIONS FOR MEDICAID APPLICATIONS

The following is a list of information that will be required for the Medicaid application. One form of identification is needed for each category in numbers 1-4, you do not need all of the items.

If you are having difficulty in obtaining any of the items on this list, please call me at the number above.

1. **Social Security cards for yourself and, if married, for your spouse.**
 2. **Proof of identity.** One of any of the following:
 - a. driver's license
 - b. state identification card
 - c. voter registration card
 - d. U.S. Passport
 - e. credit card with signature
 - f. doctor or medical record.
 - g. Any other picture identification if none of the above are available.
 3. **Proof of age.** You must provide one of the following for yourself and, if married, for your spouse:
 - a. Birth certificate
 - b. Baptismal record
 - c. Insurance policy
 - d. Marriage Certificate
 - e. Military discharge papers
 - f. Draft card
 - g. U.S. passport
 - h. Driver's license
 4. **Proof of residence.**
 - a. For an individual in a nursing home, no proof will be required.
 - b. For the spouse, a rent receipt, mortgage book, or deed may be required.
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5. Utilities, home insurance and property taxes. For married couples you must provide your last receipt if you pay any of the following:

- a. Telephone
- b. Gas
- c. Electric
- d. Water
- e. Sewer
- f. Home insurance
- g. Property taxes

6. Proof of income. These include the following:

- a. Last four to six weeks paycheck stubs if you or your spouse is working.
- b. Court support order if there is support being given.
- c. Benefits check.
- d. Social Security benefit letter, which is generally received in December for the current year
- e. Rental income.
- f. Pension stub showing gross and any amounts deducted.
- g. Proof of income from an annuitized annuity
- h. Railroad retirement

7. Life Insurance. You must provide the following if you have insurance on yourself and/or your spouse:

- a. Insurance policies.
- b. Statement from insurance company showing present cash value of any life insurance policy.

8. Medicare card. Both spouses, if married.

9. Medicare Supplement card, both sides, and current Medicare Supplement bill for each spouse or individual.

10. Proof of assets/resources. We must provide the following:

- a. Last three months' bank statements (Medicaid may ask for more)
 - This includes statements for:
 - Checking (including check register for past year, if available)
 - Savings
 - CD's
 - Money Market Accounts
 - Christmas Club Accounts
 - Credit Union Accounts
 - Any other accounts containing funds

- b. Statement showing the amount of assets as of the snapshot date (Married Couples Only). The snapshot date is the first day of a thirty day period that an individual enters a hospital or nursing home. Please talk to us before trying to determine this date.
- c. Copies of stocks and bonds or brokerage accounts.
- d. Motor vehicle titles.
- e. Real estate deeds owned during the last three years. This includes life estates.
- f. Annuity Contracts, including information as to whether the contract has been annuitized.
- g. IRA, 401(k) or other retirement account statements

11. Proof of any gifts or transfers of property during the last five years.

IMPORTANT!!!! When in doubt as to whether something was a gift or transfer discuss it with me!

12. Trust Agreement and information regarding distributions from the Trust (if any).

13. Additional verifications. Usually the caseworker will request the last three to five years federal income tax returns, and may ask for other proof.

**If you have questions, please call Bradley L. Greene, Esq.
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(c) 216-346-7002**
