

Russell E. Baldwin
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Documents Needed for Medicaid Application and/or Medicaid Planning

IDENTIFICATION:

- Driver's license or other current photo identification card for applicant and spouse
- Social Security card for applicant and spouse, both sides
- Medicare Card for applicant and spouse, both sides
- Birth Certificate or other birth record (i.e. baptismal certificate)
- Naturalization Certificate or Green Card, if foreign born
- Marriage license or divorce decree
- Death certificate of spouse, if widowed
- Military service records, if applicable
- Health Insurance Identification Card for applicant and spouse(i.e. BC/BS, AARP, Share, HMO, Health Chicago, etc., both sides)

LEGAL DOCUMENTS:

- Power of Attorney for Property
- Power of Attorney for Health Care
- Wills
- Trust documents
- Deeds to any property owned (i.e. house, summer home, investment property, etc.)

OTHER DOCUMENTS:

- Tax bills for each property owned
- Mortgage contracts
- Copies of state and federal tax returns for 3 tax years immediately preceding date of application
- Title, registration, contract and/or payment book for all cars, boats, etc.
- Certificates for all stocks and bonds, or statements from each company if certificates are not in possession of applicant
- Check or Award letter for Social Security, SSI, Veterans' benefits, Workers' compensation or other disability
- Check or Award Letter for Unemployment Insurance and/or retirement benefits
- All individual and group life and health insurance policies
- Current cash value of policies, in writing from the issuing insurance companies

- Premium Notice and copy of each medical insurance policy
- Savings accounts statements and book, credit union accounts, trust funds, safe deposit box information, other securities or bonds for the 36 months prior to filing for eligibility
- Checking account statements for the 36 months prior to filing for eligibility as well as any canceled checks during that period for over \$500.00
- Other financial account statements for the 36 months prior to filing for eligibility
- Proof of ownership and value of burial lots or prepaid burial plans
- Check from each source of income (i.e. SSA, VA, Pension, etc., or other proof of amount)
- If married, checks from each source of spouse's income (if employed, include check stubs for 6 weeks)
- Receipts for payment of medical bills
- Unpaid medical bills (doctor, hospital, dentist, prescriptions) for the 36 months prior to filing for eligibility
- Unpaid nursing home bills (if applicable) for the 36 months prior to filing for eligibility
- Written documentation of any transfer of money/asset/property belonging to applicant or spouse in the 36 months prior to filing for eligibility, including transfer from financial accounts
- Written documentation explaining all deposits or withdrawals by applicant or spouse of \$500.00 or more in the 36 months prior to filing for eligibility
- Proof that applicant did not own assets of spouse within the 36 months prior to filing for eligibility