

Filing a Medicaid Application

This is a check list of necessary documents needed to file for Medicaid. Please note there may be other items needed at the time of application.

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| | Birth certificates |
| | Social Security card - If missing, please call or go to the social security office and request a printout of what they have as the date of birth and social security number. |
| | Marriage certificate / license - only if both spouses are alive |
| | Death certificate / divorce decree of former spouse – whichever is applicable |
| | Power of attorney / legal guardianship letter |
| | Medicare / other medical insurance cards |
| | Monthly health insurance premium – letter from sources or payment coupon |
| | Bank statements of all accounts for the last 3 months to day of appointment |
| | Verification of all unearned income i.e. pension –Bring a letter from sources stating the gross amount, type, and amount of deductions of check stubs with this information. Bank statements and 1099s may not be sufficient. |
| | Burial accounts, funeral trust, prepaid funeral arrangements |
| | Life insurance policies – letter from company verifying types, effective date, policy number, beneficiary, face amount, and current cash value. A life insurance policy with a cash value must be cashed in. Life insurance money must be spent before Medicaid can be approved. If the resident does not have a burial trust, you may use the life insurance money towards prepaid funeral expenses. You can also pay outstanding nursing home or medical bills with it. |
| | Proof of all medical expenses 3 months prior to application and outstanding medical bills to the day of appointment |
| | Rental income and expenses |
| | Titles / registrations to all vehicles |
| | Deed to any land or property |
| | Earned income 3 months prior and to date of application |
| | Proof in incompetence such as medical records, nursing home admission paperwork, or a doctor's statement |
| | Credit Union accounts / Keogh plans from last 3 months to day of appointment |
| | Stocks, Bonds, CDs, and IRAs – need statement from bank stating value and interest earned in last 3 months |
| | Trust funds or life estates |
| | Taxes, insurance, and shelter expenses |

On the month you are expecting Medicaid eligibility total resources must be below the resources limits the last day of the month prior. For example, if you want Medicaid to begin 2/1/08, resources must be below the resource limits on 1/31/08. Resource limit is \$1500 for a single individual.