



## MEDICAID CHECKLIST

- \_\_\_\_\_ 1. Birth Certificate
- \_\_\_\_\_ 2. Social Security Card
- \_\_\_\_\_ 3. 1099 for Social Security Income (most recent only)
- \_\_\_\_\_ 4. Car titles and verification of liens
- \_\_\_\_\_ 5. Tax Statement on any real property owned **OR** Closing documents if real estate was sold within the last 5 years
- \_\_\_\_\_ 6. Verification of ALL income (Social Security, Veteran's benefits, SSI, Workman's Compensation, wages, pensions, rent, etc.)
- \_\_\_\_\_ 7. Medicare cards and private health insurance cards (front and back) and verification of the monthly cost
- \_\_\_\_\_ 8. Prepaid funeral agreement
- \_\_\_\_\_ 9. Cemetery lot deed
- \_\_\_\_\_ 10. Most recent nursing home bill
- \_\_\_\_\_ 11. Mortgage/rent payment, utility bills and home owners insurance, if applicable
- \_\_\_\_\_ 12. Marriage certificate
- \_\_\_\_\_ 13. Financial Power of Attorney **OR** Guardianship documents
- \_\_\_\_\_ 14. Cash Account at Nursing Home (verify current balance), if applicable
- \_\_\_\_\_ 15. Receipt for application of VA benefits, if applicable
- \_\_\_\_\_ 16. Twelve (12) months of statements for ALL accounts (checking, savings, CDs, IRAs, annuities, life insurance, etc.) Please include cash value and death benefit.  
**Please note: Job and Family may request up to five years**