

## **CHECKLIST IN SUPPORT OF MEDICAID APPLICATIONS**

Information provided on the application for Medical Assistance (DHS2) must be verified before eligibility can be determined. The following is a list of the documents needed for the initial interview. If this information is unavailable, a decision on eligibility will be delayed. Documentation of all assets with applicant's name is required even if there are other names associated with the assets. If applicant is married, information on all spousal assets and income is required regardless of whether owned solely by a spouse.

**Finances**            Statements for savings/checking accounts (with cancelled checks) for past 6 months  
CD's, Money Market funds and Annuity statements for past 6 months  
IRA's, 401k, or other retirement account statements for past 6 months along with  
amount and date of next distribution  
Stocks, bonds, mutual funds brokerage statements for past 6 months  
Savings bonds  
Trust document if applicable  
Promissory notes or accounts receivable  
Prepaid Burial Contract

**Insurance**            All life insurance policies with current surrender and face values and death benefits  
All Long Term Care insurance policies

**Property**            Deed(s) on all property(s)  
Tax assessed and fair market value  
Expenses (mortgage, insurance, taxes, water, sewer)  
Utility bill(s)  
Rent receipt if paid by applicant  
Rent receipt(s) if paid by tenants for investment property owned by applicant  
Vehicle registration, insurance, VIN, make, model & year

**Income Information**    Social Security, Veterans and other pension annual statements  
(always show gross amount)  
Earned income (most recent 4 wage receipts)  
TDI  
Unemployment compensation (Employment Security book)  
Workers' Compensation

**Personal Information**    Social Security and Federal Medicare Cards  
Private health insurance card & premium notice for medical coverage other than  
Medicare (ex. Blue Cross, AARP, United Health)  
Alien registration if applicable  
Durable Power of Attorney for Finances or guardianship certificate  
Verification of Citizenship – birth, marriage, baptismal Record, U.S. passport, etc.  
Name of Nursing Home, date of entry and daily rate  
Veterans serial number, date of service & discharge papers, if applicable  
Documentation of gifting  
Outstanding medical bills

**Other information may be requested on an individual case basis.**