

Copies of Personal and Financial Documents Required by Medicaid for Applicant and Spouse

Personal:

1. Proof of citizenship (passport, birth certificate, etc.)
2. Social Security card
3. Medicare card
4. Baptismal certificate
5. Military discharge papers
6. Divorce documents
7. Death certificate of spouse

Financial:

1. Social Security award letter, applicant and spouse (For a copies call 1-800-234-5772)
2. Proof of other income (pensions, annuities, dividends, rental income, etc.)
3. Proof of exempt “burial account” (\$1,500.00)
4. Proof of irrevocable funeral trust
5. Life insurance policy – letter from company, indicating “current cash value”
6. Stocks/Bonds/CD’s – statements or other proof of “current cash value”
7. Powers of Attorney
8. Tax returns, one year for home care, three years for institutional care
9. Checking account – Last three months of statements (for home care) or last 36 months of statements (for institutional care)
10. Savings account – Updated bankbooks (or statements) showing last 3 months (for home care) or last 36 months (for institutional care)
11. Account activity – deposits, withdrawals or checks of \$1,000.00 or more must be identified as to source, recipient and purpose
12. Rent bill and proof of payment
13. Con Ed bill and proof of payment
14. Telephone bill and proof of payment
15. Supplemental health insurance bill and proof of payment
16. Three months’ unpaid and paid medical bills