

Nursing Home and Community Based Waiver Programs Check List

This is the type of information that you will need to bring with you when applying for Medicaid. The more information you are able to provide the faster your Medicaid application can be processed.

1. Proof of Age:

One of the following documents should be provided to verify your age:

- ☐ US Passport ☐ Birth Certificate ☐ Driver's License ☐ Baptismal Certificate ☐ Other _____

2. Proof of Citizenship:

One of the following documents should be provided to verify your citizenship:

- ☐ US Passport ☐ Birth Certificate ☐ Naturalization Papers ☐ Alien Registration Card ☐ Final Adoption Decree ☐ Other _____

3. Identity:

One of the following documents should be provided to verify your identity:

- ☐ US Passport ☐ Photo License ☐ School I.D. ☐ US Military LD.

4. Marital Status: One

of the following documents should be provided to verify your marital status:

- ☐ Marriage Certificate ☐ Separation Papers ☐ Divorce Decree ☐ Spouse's Death Certificate ☐ Other _____

5. Income

In order to verify your Income, please provide copies of all that are applicable: applicable:

- ☐ Most recent pay stubs
- ☐ Social Security Check or Award Letter*
- ☐ Railroad Retirement Check or Award Letter*
- ☐ Temp. Disability Check or Award Letter*
- ☐ Pension Checks
- ☐ Unemployment check stubs
- ☐ Workers Comp. check stubs
- ☐ Support/Alimony Checks or Court Order
- ☐ VA check or Award Letter*
- ☐ Reparation Payments
- ☐ Payments from Boarders
- ☐ SSI Award Letter
- ☐ Dividend Checks
- ☐ Federal Income Tax Returns including schedules:
 - ☐ Schedule C - Net Profit from Business
 - ☐ Schedule D - Capital Gains
 - ☐ Schedule E - Rental Real Estate

6. Financial Resources

To provide the most accurate picture of your **Financial Resources**, you must provide copies of all that is 36 months of the most recent statements for all accounts and January, June and December for years .4 and 5

- ☐ Checking Acct Statements ☐ Savings Acct Statements
- ☐ Stocks or Bonds ☐ Certificates of Deposit
- ☐ Amount of Cash on Hand ☐ List of Valuables (jewelry, IRA, 401K, 403B, Keogh ☐ Trusts or other Financial Instruments
- ☐ Money Market Accounts ☐ Annuities
- ☐ Deeds to Property Owned ☐ Property Proceeds
- ☐ Mortgages ☐ Prepaid Funeral Contracts
- ☐ Christmas/Vacation Clubs ☐ Credit Union Shares
- ☐ Burial Plot Information ☐ Funds set aside for Burial
- ☐ Special Needs Trusts
- ☐ Life Insurance Policies with Cash Value Statement ☐ Life Insurance Trust Shares
- ☐ Other copies of checks and deposits exceeding \$5,000.00 during the previous 5 years, Medicare Card and Social Security Card

If the Medicaid recipient is placed in a nursing facility, but the SPOUSE remains living in their residence, Provide Copies of the following:

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| <input type="checkbox"/> Mortgage Statements | <input type="checkbox"/> Real Estate Tax Bills | <input type="checkbox"/> Rent Receipts |
| <input type="checkbox"/> Electric Bills | <input type="checkbox"/> Gas / Oil Bills | <input type="checkbox"/> Water / Sewer Bills |
| <input type="checkbox"/> Telephone Bills | <input type="checkbox"/> Connection Charges | <input type="checkbox"/> Home / Renter's Insurance |
| <input type="checkbox"/> Outstanding Loans | <input type="checkbox"/> Health Insurance Bills | <input type="checkbox"/> Unpaid Medical Bills (past 3 months) |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Other _____ | |