

Required Documents Necessary to Determine Medicaid Eligibility

IDENTITY:

Two of the following:

- Birth Certificate
- Baptismal Certificate
- Driver License
- US Passport

US CITIZENSHIP:

One of the following:

- Naturalization Certificate
- US Passport
- Alien Registration Card
- Voter Registration Card
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SOCIAL SECURITY:

the following:

- Social Security Card/Application for duplicate/copy
- Printout from Social Security Administration-TPQY

MARTIAL STATUS:

One of the following:

- Marriage Certificate
- Legal Separation Agreement
- Divorce Decree
- Spouse's Death Certificate

RESIDENCE:

One of the following:

- Deed, Lease or Rent Receipt
- Residence prior to admission to nursing home must be verified for six months to 1 year

INCOME:

- Earned:
 - 4 most recent Paystubs if weekly, 2 Paystubs if Bi-weekly
- Unearned:
 - Copy of social security check or TPQY

Pension Check and Stub

Dividends, Annuities, Partnership, Rentals, IRA Distributions

RESOURCES:

Include JOINTLY HELD Accounts:

- Any property that you owned in the past 60 months
- Passbooks, Banks Statements—60 months
- Stocks, Bonds, Annuities—60 months
- Investments/Brokerage Funds- 60 months
- C.D, Credit Union, IRA- 60 months
- Trust Agreement and Principle Statements -60 months
- *Include any accounts/resources which may have been closed, cashed in, or transferred within the last 60 months
- Income Tax Returns including 1099's—(5 years)
- Financial summary of any private payments made to a Nursing Home
- Verification and classification of any withdrawals or deposits over \$3000.00 (Copy of cancelled Checks or Deposit Receipts—60 months)

LIFE INSURANCE:

- Appraisal of a house/property either current or transferred within five years.
- Copy of policy and verification of its cash value
(Name and Account # must be shown on policy)

HEALTH INSURANCE:

- Medicare Card
- Identification Card for Health Insurance
- Verification of Health Insurance Premium (premium amount and proof of payment)
- Verification of a Long Term Care Policy

VETERAN STATUS:

- Military Discharge Certificate for Applicant or Spouse