

Medicaid Materials Needed – Single Individual

In order to prepare a Medicaid application, we will need the following materials, as applicable. There may be other items needed, but those will be requested when needed.

1. A copy of the Medicaid applicant's Social Security card (front and back);
2. A copy of the Medicaid applicant's Medicare card (front and back);
3. A copy of the Medicaid applicant's driver's license or other photo identification;
4. A copy of the Medicaid applicant's birth certificate;
5. A copy of the Medicaid applicant's spouse's death certificate or obituary notice reflecting his/her date of death;
6. A copy of the Medicaid applicant's supplemental health insurance card (front and back) and a statement from the insurance company verifying the premiums he/she pays each month;
7. If the Medicaid applicant is enrolled in a Medicare Part D prescription plan, please provide us with a copy of his/her prescription card (front and back) and a statement from the insurance company verifying the premiums he/she pays each month;
8. A copy of each regular monthly statement received from the bank for each of the Medicaid applicant's checking, savings, and investment accounts for the three (3) months prior to the month of eligibility, forward, and continuing until he/she is formally approved for Medicaid;
9. A copy of each of the Medicaid applicant's checkbook and savings registers for the three (3) months prior to the month of eligibility, forward, and continuing until he/she is formally approved for Medicaid;
10. A copy of each of the Medicaid applicant's life insurance policies, annuity contracts, and long-term care policies, as applicable;
11. A copy of the deed(s) to any real estate the Medicaid applicant owns;
12. A copy of the deed(s) for any cemetery lot(s) the Medicaid applicant owns;

13. A copy of the title(s) to (each of) the Medicaid applicant's vehicle(s) and an appraisal (for each) performed by an authorized car dealer, on the dealer's letterhead, signed by the dealer;
14. A copy of all documents pertaining to the Medicaid applicant's prepaid funeral arrangements (including a copy of the policy or trust agreement, the itemized statement of goods and services selected, and the irrevocable assignment of the policy to the funeral home);
15. A copy of the Medicaid applicant's most recent Federal Income Tax Return, including all schedules;
16. A copy of any unpaid medical bills the Medicaid application has;
17. A copy of the Medicaid applicant's most recent real estate tax bill(s), homeowner's insurance bill, and farm insurance bill, as applicable;
18. A copy of the lease agreement for any property for which the Medicaid applicant pays or receives rent;
19. Verification of any pension income the Medicaid applicant receives; and
20. Documentation of any gifts the Medicaid applicant has made within the past 60 months that exceeded \$3,000 in any one month.