

Medicaid Application Information Request

To prepare a Medicaid application, we will need a copy of the following materials, as applicable, for both the person applying for Medicaid and spouse. There may be additional items needed in the future, but those will be requested as needed:

- Social Security card, front & back
- Medicare card, front & back
- Photo Identification (*i.e.*, drivers' license or passport)
- Birth Certificate
- Marriage License
- Supplemental Health Insurance card, front & back, including a statement from each insurance company verifying the monthly premiums
- Medicare Part D Prescription Plan card, front & back, including a statement from each insurance company verifying monthly premiums
- Bank statement for checking, savings and investment accounts for 3 months prior to the month of eligibility, forward, and continuing until formally approved for Medicaid
- Checking account registers for 3 months prior to month of eligibility, forward, and continuing until formally approved for Medicaid
- Life Insurance policies, annuity contracts and long-term care policies
- Deed(s) to real estate
- Deed(s) for cemetery lot(s)
- Title(s) to vehicle(s) and an appraisal performed by an authorized car dealer, on dealer letterhead, signed by the dealer
- Funeral Arrangement documentation, including a copy of the policy or trust agreement, itemized statement of goods and services selected and the irrevocable assign of the policy to the funeral home

- One month's utility bills (*i.e.*, electric, gas, water, sewage)
- Federal Income Tax Returns (Form 1040), including all schedules, from the most current year
- Most recent real estate tax bill(s), homeowner's insurance card and farm insurance
- Lease agreement for any property for which rent is paid or received
- Unpaid medical bills
- Verification of any pension income currently being received
- Social Security income verification
- Documentation of any gift that has been made within the past 60 months, or five years, that exceeds \$1,200 in any one year (*i.e.*, cash, vehicles, jewelry, etc.)