

Medicaid Application Information Request

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

- Social Security card
- Medicare card (front and back)
- Photo Identification (i.e. driver's license or passport)
- Birth Certificate
- Marriage Certificate
- Supplemental health insurance card (front and back), and a statement from the insurance company verifying the monthly premiums
- Medicare Part D prescription plan card (front and back), and a statement from the insurance company verifying the monthly premiums
- Complete bank statements for all checking, savings, money market, or certificate accounts (including IRAs) for three (3) months prior to the month of eligibility, forward, and continuing monthly until formally approved for Medicaid
- Checking account registers for three (3) months prior to the month of eligibility, forward, and continuing monthly until formally approved for Medicaid
- Complete statements for all investment/brokerage accounts for three (3) months prior to the month of eligibility, forward, and continuing monthly or quarterly (as applicable) until formally approved for Medicaid
- Life insurance policies, annuity contracts, and long-term care policies
- Deed(s) to all real estate owned
- Most recent real estate tax bill(s), homeowner's insurance bill, and farm liability insurance bill (as applicable)
- Deed(s) to any cemetery lot(s) owned

- Title(s) to all vehicles owned (including watercraft and trailers) and an appraisal for each performed by an authorized car dealer, on the dealer's letterhead, signed by the dealer
- Funeral arrangement documents (as applicable), including a copy of the policy or trust agreement, the itemized statement of goods and services selected, and the irrevocable assignment of the policy or trust to the funeral home
- One month's utility bills (i.e. electric, gas, water, sewage)
- A complete copy of the most recent federal income tax return, including all schedules and attachments
- Lease agreement for any property for which rent is paid or received
- Unpaid medical bills
- Verification of the current gross monthly pension income being received
- A statement from Social Security to document the monthly income for the current year
- Documentation of any gift that have been made within the past 60 months (including, but not limited to, gifts of cash, vehicles, jewelry, etc.)