

Home Care Medicaid Document Checklist

The following information is necessary to complete the Medicaid application. **Copies are fine for all documents;** originals are not necessary. The more documentation provided the quicker the processing time.

Please provide at least **ONE** document from each of the following categories (for both the APPLICANT and their SPOUSE):

**and any other adults living in the house*

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| <p>1. Proof of Age/Identity</p> <input type="checkbox"/> U.S Passport
<input type="checkbox"/> Birth Certificate
<input type="checkbox"/> N.Y.S Driver's License | <p>2. Proof of Citizenship</p> <input type="checkbox"/> U.S Passport
<input type="checkbox"/> Birth Certificate
<input type="checkbox"/> Naturalization Papers
<input type="checkbox"/> Alien Registration Card | <p>3. Marital Status</p> <input type="checkbox"/> Marriage Certificate
<input type="checkbox"/> Divorce Decree/Separation Agreement
<input type="checkbox"/> Pre- or Post-Nuptial Agreement
<input type="checkbox"/> Spouse's Death Certificate |
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Please provide ALL applicable documents from the following categories (for both the APPLICANT and their SPOUSE):

4. Financial Resources

All statements for applicable resources owned in the last 3 months

- Checking Account Statements
- Saving Account Statements
- Certificates of Deposit
- Credit Union Account Statements
- IRA, RMD, 401K, Keogh Accounts
- Annuities, Stocks, Bonds, Mutual Funds
- Trust Accounts
- Life Insurance Policy with Cash Value Statement
- Title to Automobile & Fair Market Value
- Burial Plot Information
- Prepaid Funeral Contracts
- Separate funds for burial
- Life Insurance for burial
- Mortgages/Liens
- Deeds to Property Owned & Listing Agreement
- Other Real Estate
 - Rental/Vacation Property
 - Time Shares
 - Land
 - Property right in or out of NYS
- Any Legal reason you cannot sell your home
- Anyone else living in your home

6. Advance Directives

- Power of Attorney

5. Income

- SSI Award
- Most recent Pay Stubs
- Support/Alimony Checks OR Court Order
- Annuities & Trust Income
- Interest & Dividends
- Pension Statement
- Temp. Disability Check OR Award Letter
- VA Award Letter
- Unemployment Check Stubs
- Temporary (cash) Assistance
- Student Grants or Loans
- Rental Income
- Reparations
- Contributions from Others
- Social Security Gross Monthly Income Letter

**This is not the SSA-1099*

7. Other

- Long-Term Care Insurance
- Veteran: Discharge Paper
- Water Bill (if paid separately)
- Additional Insurance Cards
- Medicare Card (Front & Back)

Replacement: www.account.mymedicare.gov

Phone: 1-800-633-4227

- Social Security Card (Front & Back)

Replacement: www.ssa.gov/myaccount

Phone: 1-800-772-1213

If you are having trouble obtaining any documents, please speak with your Sloan & Feller Medicaid Service Coordinator, as he/she may be able to help you obtain certain documents.