

## 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*

### 1. Proof of Age/Identity

- U.S Passport
- Birth Certificate
- N.Y.S Driver's License

### 2. Proof of Citizenship

- U.S Passport
- Birth Certificate
- Naturalization Papers
- Alien Registration Card

### 3. Marital Status

- Marriage Certificate
- Divorce Decree/Separation Agreement
- Pre- or Post-Nuptial Agreement
- Spouse's Death Certificate

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

*\*All pages are required for statements. Including Front and Back and Blank Pages*

### 5. Income

- SSI Award Letter - Visit: [www.ssa.gov/manage-benefits/get-benefit-letter](http://www.ssa.gov/manage-benefits/get-benefit-letter)
- Most recent Pay Stubs - One Months Worth. (4 weekly or 2 bi-weekly)
- 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

*\*AKA proof of income letter (This is not the SSA-1099)*

*Visit: [www.ssa.gov/manage-benefits/get-benefit-letter](http://www.ssa.gov/manage-benefits/get-benefit-letter)*

*Phone 1-800-772-1213*

### 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](http://www.account.mymedicare.gov) Phone: 1-800-633-4227*

- Social Security Card (Front & Back)

*Replacement: [www.ssa.gov/myaccount](http://www.ssa.gov/myaccount) Phone: 1-800-772-1213*

### 6. Advance Directives

- Power of Attorney

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