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**List of Documents Required for Medicaid Application**

**A. Proof of identity and family relationships**

- \_\_\_\_\_ Social Security Card
- \_\_\_\_\_ Driver's License
- \_\_\_\_\_ Birth or Baptismal Certificates
- \_\_\_\_\_ Military Discharge Papers
- \_\_\_\_\_ Marriage Certificate
- \_\_\_\_\_ Death Certificate of Spouse
- \_\_\_\_\_ For those family members not born in the U.S.A.
  - \_\_\_\_\_ a. Certificate of Naturalization
  - \_\_\_\_\_ b. Passport and/or Visa
  - \_\_\_\_\_ c. Alien registration card

**B. Residency and Living arrangement**

- \_\_\_\_\_ Rent Receipt and/or Lease
- \_\_\_\_\_ Utility Bills (most current)

- \_\_\_\_\_ Mortgage statement; property and school tax bills (most current)
- \_\_\_\_\_ 2 letters of residence, from other than relative, stating length of time at given address
- \_\_\_\_\_ If you live with another person, a letter from them verifying that they supply room and board
- \_\_\_\_\_ Existing nursing home contract, if any

**C. Income**

- \_\_\_\_\_ Pay Stubs for previous eight (8) weeks
- \_\_\_\_\_ Unemployment Insurance book
- \_\_\_\_\_ Statement of rental and/or room and board income
- \_\_\_\_\_ Support payments – divorce or separation papers
- \_\_\_\_\_ Award letter and/or photocopy of check for the following benefits:
  - \_\_\_\_\_ a. social security
  - \_\_\_\_\_ b. veterans
  - \_\_\_\_\_ c. union pensions
  - \_\_\_\_\_ d. railroad retirement
  - \_\_\_\_\_ e. insurance endowments
  - \_\_\_\_\_ f. N.Y.S. Disability
  - \_\_\_\_\_ g. Worker’s Compensation
- \_\_\_\_\_ If self-employed; business books and records
- \_\_\_\_\_ Form 1040 Income tax returns (past 3 years)
- \_\_\_\_\_ Form 1099 for any interest, dividends, or other income for the last 3 years

**D. Resources**

- \_\_\_\_\_ All bank books for the past 60 months including closed accounts with a copy of title page
- \_\_\_\_\_ Checking account statements for the past 60 months (with copies of checks over \$1,000)
- \_\_\_\_\_ Stock broker statements for the past 60 months
- \_\_\_\_\_ Mutual fund statements for the past 60 months

- \_\_\_\_\_ Statements for IRA accounts for the past 60 months
- \_\_\_\_\_ Statements of Qualified Retirement Accounts (Non-IRA) for the past 60 months
- \_\_\_\_\_ Statements of annuities for the past 60 months
- \_\_\_\_\_ A letter from each life insurance company indicating the following information with respect to the policy: face value, death benefit, cash value and surrender value
- \_\_\_\_\_ Long-Term Care Insurance Policies
- \_\_\_\_\_ All Stocks and Savings Bond Certificates. If in a brokerage account each statement for the past 60 months
- \_\_\_\_\_ Real Estate deeds
- \_\_\_\_\_ Any Notes or Mortgages receivable by you with Amortization schedule
- \_\_\_\_\_ Health and Accident insurance policies and latest premiums
- \_\_\_\_\_ Medicare card
- \_\_\_\_\_ Closing papers on property sale
- \_\_\_\_\_ Deed to burial plot
- \_\_\_\_\_ 517 Physician's request for home health aide (for home care outside NYC)

**E. Other**

- \_\_\_\_\_ Spousal Refusal
- \_\_\_\_\_ Power of Attorney
- \_\_\_\_\_ Living wills
- \_\_\_\_\_ Wills
- \_\_\_\_\_ Certificate of Title to Automobiles and Recreation Vehicles
- \_\_\_\_\_ Trust documents