

# LIST OF DOCUMENTS REQUIRED FOR MEDICAL ASSISTANCE APPLICATION

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## **Begin gathering these documents if you are considering filing an application for Medical Assistance**

- € Social Security card(s).
- € Medicare card and any additional health insurance card(s).
- € Current health insurance premium verification.
- € All life insurance verification with verification of their current cash surrender value(s).
- € Prepaid burial plans with verification of their irrevocability, if applicable.
- € Bank statements for the month of application and the last three months.
- € Verification of the disposition of all large checks.
- € Verification of any recently closed accounts.
- € Power of Attorney, guardianship, or conservatorship papers.
- € Complete copies of all trusts with the accompanying Schedule A.
- € Complete copies of all annuities.
- € Verification of the values of all CD's, stocks, bonds, and other investments.
- € Real estate deeds and verification of the amount owed, if any.
- € Car title(s).
- € Verification of the gross Social Security amount and the gross amount of all other pension(s). Please note that the direct deposit to bank accounts does not verify the gross benefit.
- € Verification of all transfers of property over the last 3-5 years (ask worker for details).
- € Birth verification.

## **If the client is under 65, then provide the following:**

- € verification of Social Security Disability (SSD)
- € verification of Supplemental Security Income (SSI)
- € A complete list of all doctors and hospitals to obtain medical records from.
- € Marriage verification.
- € Recent utility bills with the address.
- € Verification of rent or house payments.
- € Verification of condominium maintenance fees, if applicable.
- € Most recent real estate tax and homeowner's insurance payments.
- € Verification of all gross income for the community spouse (including interest & dividends).
- € Verification of the first 30 days of institutionalization (defined as the first 30 continuous days in a hospital and/or venter certified bed in a nursing facility).
- € Verification of value of all assets for the month of institutionalization – if month of institutionalization is different from the month of application.