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INFORMATION NEEDED FOR MEDICAID APPLICATION OR LONG-TERM CARE

Please Bring this information to your appointment.

Applicant's full name, date of birth, social security number, address, marital status, where living

Driver's license or other citizenship and identity verification.

All income amounts and sources - Social Security, pensions, etc., rental income?

For Social Security, Pensions, and Other Monthly Retirement Income- Form from Social Security Administration or other source showing gross amount for each month in current year and deductions for taxes, premiums, etc. For Social Security this is the benefits letter received late in the prior year.

Social Security and Medicare Cards

Supplemental Health Insurance Cards

Veteran information- DD214 form, military ID card. (For applicant AND spouse)

If you have a disabled child- disability onset date, copy of initial award letter or other verification from SSA giving disability onset date.

Any premarital or other marital property agreements.

3 most recent months bank statements for all bank accounts (checking accounts, savings accounts, money market accounts, certificates of deposit) Please update this information each month while the application is being prepared or is pending.

Information on stocks, bonds, and securities, mutual funds, IRAs, annuities, and all other financial assets and accounts

Patient trust fund at nursing home- statements or printouts from nursing home for past 3 months.

List of all real estate owned, including any life estates- Copies of deeds (if available) and tax appraisal and any market value analysis.

Life Insurance Policies - Need copy of policy or at least page from policy or correspondence showing owner, face value, any cash value, dividend option, amount of dividends on deposit if applicable.

Pre-need funeral contracts- copy of contract showing goods and services purchased and copy of

signed irrevocable waiver.

Burial plots- Deed, number spaces, name of cemetery, owner, designation

Make, model, year, VIN No. and mileage of all vehicles- trucks, cars, Rvs, boats, and ATVs- copy of title or registration documents.

List of property or assets of any kind, sold, transferred, deeded, or given away in past 60 months- copies of deed, settlement or closing statement, bank statements, cancelled checks and deposit slips, showing the date of transfer and recipient of the assets.

Any closed accounts (investment, bank account, annuity) in past 60 months - need documentation of closing date, closing balance, and where it went

Does applicant have a safe deposit box? Location and List of Contents:

Any cash on hand?

Oil and gas income or mineral ownership? If yes, in what county? Copy of current and prior lease and tax appraisals, royalty statements for current and prior year.

Business property- partnership agreements, LLC operating agreements, corporate bylaws, certificate of formation, minute books, financial statements, business tax returns, including all schedules

Notes, loans, property agreements- copy of note, deed of trust or other security document, amortization schedule, payment history

Employment income- employer statements or check stubs for current year.

Other income- proof of gross and net income, check stubs for current year. Lease agreements, any other verification.

Work equipment- same information as for Vehicles.

Any lawsuits or settlements pending in which you have a claim?

Copy of Durable Power of Attorney if agent is signing application.

Guardianship documents if applicable- current letters of guardianship, court order, inventory, and most recent accounting.