

# 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 Accts
- 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 and Listing agreement
- Other Real Estate:
  - Rental/Vacation Property
  - Time Share
  - 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 & back*

**6. ADVANCE DIRECTIVES**

- Power of Attorney

**5. INCOME**

- SSI Award Letter
- Most recent Pay Stubs
- Support/Alimony Checks OR Court Order
- Annuities & Trust Income
- Interest and Dividends
- Pension Statement
- Temp. Disability Check OR Award Letter
- VA Award Letter
- Unemployment Check Stubs
- Temporary (Cash) Assistance
- Student Grants or Loans
- Rental Income
- Repairs
- 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](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*

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.

The following is required for the Social Worker to establish the Pooled Community Trust:

- Money order OR Cashier's Check for setting up Pooled Trust – *This money goes directly to the Pooled Trust company and is separate from any legal fees.*
- Home visit by social worker to conduct an assessment of needs and to complete forms.

SLOAN & FELLER

625 Route 6, Mahopac, New York 10541  
Phone (845) 621-8640 Fax (845) 621-8639