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## Re: Information needed for Medicaid Application

The information generally required by Michigan's Department of Health and Human Services (the agency that runs Medicaid) is as follows:

### 1) Personal records for both Medicaid applicant and spouse, such as:

- Social Security card (photocopy front and back);
- driver's license or state identification card (photocopy front and back);
- health insurance cards (photocopy front and back);
- Medicare card (photocopy front and back);
- copy of birth certificate;
- copy of durable power of attorney, if any;
- copy of other estate planning documents, such as a will, trust, patient advocate designation;
- name, address, and phone number of the nursing home where applicant is residing;
- copy of the nursing home "Face Sheet" for applicant showing date of admission to the nursing home and hospital; and
- Admission notice with proof of the first day of any other 30-day stay in a hospital, rehabilitation center or nursing.

2) Asset Records for both Medicaid Applicant and spouse as of the "snapshot date" **Note: Snapshot date is the first date of admission to the hospital followed by transfer to a skilled nursing facility for a combined stay of more than 30 days.** Please provide the following documentation for each asset:

- copy of deeds to all real estate;
- titles to any vehicles;
- documents identifying any land contracts and values, if any;
- documents identifying burial plots, if any;
- documents identifying funeral contracts and values, if any;

- bank statements (checking, savings, money market, or CD) for the most recent month and ongoing bank statements reflecting balances so that we can calculate values as of the date of admission and approximately 30 days afterwards;
- copies of all life insurance policies (account numbers, addresses, and phone numbers) and the cash surrender values of these policies for the most recent month, so that we can calculate values as of the date of admission and approximately 30 days afterwards;
- copies of all stock certificates, annuities, IRAs, or mutual funds (account numbers, addresses, and phone numbers) and the cash surrender values of these accounts, for the most recent month, so that we can calculate values as of the date of admission and approximately 30 days afterwards; and
- copies of all saving bonds and the cash surrender values of these accounts for the most recent month, so that we can calculate values as of the date of admission and approximately 30 days afterwards.

3) Current Asset Records for both Medicaid Applicant and spouse. Assets include those mentioned in part 2), above.

4) Income records for both Medicaid applicant and spouse, such as:

- evidence of Social Security or Supplemental Security income (copy of a check or a Social Security benefits letter); and
- evidence of pension, such as a statement from former employers

5) Household expenses for both Medicaid applicant and spouse, such as:

- copy of current mortgage statement;
- property tax statement for your home for the past year (summer and winter taxes);
- copy of rent or lot statement;
- homeowners insurance statement;
- current bills or receipts for gas and electric;
- health or medical insurance premium statements; and
- long term care insurance policy, if any.

6) Verification of all gifts (divestments) that have been made in the last five years, and evidence relating to the return of the assets, such as:

- settlement statements for the sale of real property during the last five years;
- statements reflecting the sale of any vehicles during the last five years;
- bank statements evidencing the return of transfers for less than fair market value;
- copies of revocable trusts created within the last five years;
- promissory notes entered into within the last five year; and
- caregiver Agreements.

7) Income Tax Returns for the past two years, including all schedules.