

MEDICAL ASSISTANCE LONG-TERM CARE APPLICATION REQUIREMENTS

Photocopies of the following documents are required to establish Medical Assistance eligibility.

1. Verification of Birth: Birth or Baptismal Certificate
2. Social Security Card
3. Current award/benefit letters for all sources of income, including Social Security, pensions, annuities, and trust agreements, showing gross monthly income and itemizing all deductions.
4. Life Insurance Policies: Valuation letter from insurer stating face and cash values, dividend accumulations, dividend additions, additional paid-up insurance and loans against the policy. For spousal cases, these letters must also be provided for the first day of the month of nursing home placement.
5. Health Insurance Cards: Copied front and back, including Medicare, private/supplemental health insurance, prescription drug plans, and a copy of the most recent premium bill and proof of payment.
6. Real Property: Copies of deed for each parcel, whether owned individually or jointly, tax assessments and property tax bills. If property has been sold within the last 5 years, a copy of the settlement sheet (HUD-1) is also required.
7. Funeral Arrangements: Must include either 1.) Supplemental Agreement to Establish an Irrevocable Pre-Need Funeral Service Trust or 2) Irrevocable Assignment.
8. Cemetery Plots: Copy of the deed or certificate of ownership for cemetery plots. If more than one plot is owned and unoccupied for an individual applicant or more than 2 plots owned and unoccupied for a spousal applicant, a letter of designation regarding the additional, unoccupied plots must be provided.
9. Automobiles and Recreational Vehicles: Title and/or registration certificate.
10. Spousal Applicants:
 - a. If living, marriage license, driver's license, award/benefit letters for all sources of income, documentation of shelter expenses (most recent bill and proof of payment for mortgage/rent, utilities, water, homeowner's/renter's insurance and property taxes).
 - b. If deceased, a copy of the death certificate.
11. Documentation of all assets owned by applicant and/or spouse whether opened or closed in the past 5 years:
 - a. Bank statements or passbooks for all assets whether titled in the name of the applicant or the applicant's spouse, regardless of whether other persons are on title to the account. This includes checking, savings, certificates of deposit, money market accounts, mutual funds, retirement accounts, and securities.
 - b. For individually held stocks, a certificate history for the past 5 years will be required.
 - c. For U.S. Savings Bonds, copies of the bonds, redemption slips (if redeemed) and current valuation, if still owned. For spousal cases, valuation as of the first day of the month of nursing home placement.
 - d. Verification of all transactions over \$1,000, including withdrawals, checks, and deposits. For deposits, verification of the source of funds will also be required.
 - e. Federal Income Tax Returns for the preceding 5 years.
12. Nursing Home: Receipts from the nursing home indicating amounts paid. For spousal cases, a letter from the nursing home stating the admission date is also required.