

## Items Needed for Medicaid, by Category

### Identity:

- o Intro Letter to DSHS, explaining your situation in brief
- o Power of Attorney
- o Birth certificates
- o Marriage certificate
- o Social Security cards
- o Driver's license or identification card
- o Medicare cards
- o Supplemental insurance cards
- o Veterans DD214 (if applicable)

### Income: Needed for Net Worth

- o Rental income, if any
- o Pension income statement showing monthly payment
- o Social Security benefit statements that come annually showing GROSS income
- o Veterans benefit income, if any
- o Any other fixed incomes

### Assets: Needed For Net Worth

- o All bank account statements (most recent three months) + Transaction history to date

**OR!!!!**

- o Transaction history for most recent three months which MUST include , "Name, Bank and acct numbers" (NOTE!!! With Bank or Transaction, also click to print any checks over \$300 that the statements do not show proof of where they went!! Very important.) DSHS thinks your gifting!

- o Investment statements (most recent three months)
- o Life insurance policies, if any, and most recent cash value
- o Prepaid funeral policies, if any
- o Most recent assessed value of all homes and property (Property Tax Bill)
- o Registration documents and mileage for all vehicles (includes boats, trailers, ATV, etc.)
- o Stocks (if not listed with brokerage) need number of shares held

### Expenses:

- o Mortgage statement, if any
- o Credit card statements, (most recent three months)
- o Vehicle loans, if any, most recent balance
- o All utility bills, most recent
- o All insurance premium bills, most recent
- o Property Tax bill 2016

### Medical

- o Most recent medical and prescription drug bills
- o Medical insurance premiums
- o Medical supply expenses