

***Check list of documents needed for application***

This is a check list of necessary documents needed to file for Medical Assistance. Please note there may be other items requested by the caseworker. Our company will assist you through this application process; however, ***it is the family’s responsibility to provide the necessary information.*** Originals are not needed. We will assist you with any copying.

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| Resident | Spouse | **NO STAPLES PLEASE!!!** |
| ⃝ | ⃝ | Birth, baptism certificate or PA ID card |
| ⃝ | ⃝ | Social Security card |
| ⃝ | ⃝ | Medicare card (front & back) |
| ⃝ | ⃝ | Health insurance card (front & back) |
| ⃝ | ⃝ | Income verification letter from Social Security |
| ⃝ | ⃝ | Income verification letter or check stub from pension showing gross & net |
| ⃝ | ⃝ | Proof of health insurance premiums |
| ⃝ | ⃝ | Two years checking account statements + 2 statements per year back to 2015. |
| ⃝ | ⃝ | Two years savings account statements + 2 statements per year back to 2015. |
| ⃝ | ⃝ | Two years credit union statements + 2 statements per year back to 2015. |
| ⃝ | ⃝ | Two years money market statements + 2 statements per year back to 2015. |
| ⃝ | ⃝ | Accounts closed within the past 5 years – proof of transferred assets |
| ⃝ | ⃝ | Savings bonds/Shares of stock |
| ⃝ | ⃝ | CD’s, IRA’s or any other investment accounts |
| ⃝ | ⃝ | Deed to any real estate |
| ⃝ | ⃝ | Title/registrations to all vehicles |
| ⃝ | ⃝ | Life insurance policies – letter stating face and current cash value |
| ⃝ | ⃝ | Prepaid funeral or burial reserve (Must state “IRREVOCABLE”) Max amount $20,584.30 |
| ⃝ | ⃝ | Deed to cemetery plot |
| ⃝ | ⃝ | Power of attorney or Guardianship papers |
| — | ⃝ | One month of monthly bills (mortgage, rent, utilities) |
| — | ⃝ | Taxes (city, county school) |
| — | ⃝ | Home owner’s insurance premium |
| ⃝ | — | If short term - proof of rent, mortgage or utility bill to keep $805.10 from income with doctor’s approval |