

# MEDICAID APPLICATION CHECKLIST

## Documents Needed for Medicaid Applicant

- \_\_\_\_\_ **Identification** – Birth certificate, passport, School records, or any documentation that has the date and place of birth.
- \_\_\_\_\_ **Social Security Card** or any document from Social Security which verifies your account number.
- \_\_\_\_\_ **Colorado picture ID card or driver's license.**
- \_\_\_\_\_ **Medicare Card** (copy of front and back of the card)
- \_\_\_\_\_ **Durable Power of Attorney.**
- \_\_\_\_\_ **Doctor's letter** (for Home and Community Based Services only)

## Documents Needed for Medicaid Applicant AND Spouse (If Applicable), Regardless of How Titled:

- \_\_\_\_\_ **Residency** – a current rent receipt, or mortgage payment receipt and tax receipt, if you own your own home.
- \_\_\_\_\_ **Home Maintenance / HOA Fees**
- \_\_\_\_\_ **Utility statements** (heat, electricity, water, sewer, phone, trash) for the past six (6) months
- \_\_\_\_\_ **Supplemental Health Insurance:** Copy of Front and back of the card, and amount of premium.
- \_\_\_\_\_ **Statements, canceled checks, receipts, etc.** for the spouse's (if applicable) out-of-pocket expenses for the past six (6) months (including medical co-pays, dental, vision, pharmacy, etc...)
- \_\_\_\_\_ **Income** – Income documentation showing gross monthly income and deductions. Verification can be a check, automatic bank deposit statement, recent annual award letter or pay stub. DSS requires a copy of the annual Social Security award statement, as well as pension award statements. The DSS considers the following items as income: wages, Social Security, SSI, VA benefits, Railroad Retirement, PERA benefits, unemployment benefits, Worker's Compensation, interest income, rental income, any other retirement benefits, as well as any money you receive regularly to help with your expenses or for a debt owed to you.
- \_\_\_\_\_ **Bank Accounts** – current checking account balance and the last six (6) months bank statements, current savings account balance and the last six (6) bank statements, list of contents in a safety deposit box, certificates of deposit.
- \_\_\_\_\_ **Stock Certificates, Bonds, Treasury Bills, etc...** - and documentation of current value
- \_\_\_\_\_ **Trusts** and documentation of current value and asset holdings
- \_\_\_\_\_ **Real Property** – any land, rights in land (oil, gas, mineral, water rights), and buildings on the land are considered real property. The DSS requires deeds, mortgages or tax statements on any real property.
- \_\_\_\_\_ **Other** – any other resources you own must be verified. These include, but are not limited to, trusts, stocks, bonds, oil leases and IRA, and 401(k) accounts.
- \_\_\_\_\_ **Burial** – any burial policies and purchase agreements for plots, headstones, caskets, etc.
- \_\_\_\_\_ **Insurance** – DSS requires insurance policies for life, health, burial, auto, accident, homeowners and rental insurance. The documentation needs to verify the face value and cash surrender value, as well as the beneficiaries.

\_\_\_\_\_ **Marriage License** (if spouse is still alive) or **Separation Agreement** if divorced.

\_\_\_\_\_ **Motor vehicles** – DSS requires the vehicle registration on any vehicles you own, are purchasing, or own in joint tenancy (regardless of whether or not the vehicle is functional).

\_\_\_\_\_ **Veterans Discharge Papers.** (DD214)

\_\_\_\_\_ **Property transfers** – any property, including money, which has been sold, traded, given away or put into another individual's name within the past five years must be documented.

\_\_\_\_\_ **Previous assistance** – if you have previously been on public assistance in another state or county, DSS must verify the date of discontinuance.

\_\_\_\_\_ **Proof of application for SSI** – if you are applying for AND (Aid to the Needy Disabled) and do not currently receive SSI, you must provide verification that you have applied.