Compass
MEDICAID SERVICES

Document Checklist

Everything we need to prepare your Medicaid application

Gathering these up front is the single biggest thing you can do to keep your case moving. The county gives short deadlines for follow-up requests, so the more we have at intake, the fewer surprises later. If a document doesn't apply to your situation, just skip it — we'll flag anything else we need as we go.

> **Two documents the county will NOT accept as proof of income or assets:**
> Tax returns and W-2/1099 forms. Bring them anyway for our records, but income needs a benefit letter, check stub, or agency statement, and assets need current account statements.

1. IDENTITY & PERSONAL DOCUMENTS

- Birth certificate, marriage license, driver's license, and Social Security card (for the applicant and spouse, if married)
- If a spouse has passed away, a copy of the death certificate
- Medicare card, all health insurance cards, and prescription cards (front and back)

2. INCOME VERIFICATION (APPLICANT AND SPOUSE)

Proof of every source of income for both the applicant and spouse. This must show the current year, both gross and net amounts.

- Social Security award letters
- Pension statements
- VA benefits (broken down by type)
- Rental income (include a copy of the lease)
- Any other income source

Acceptable proof: benefit award letters, check stubs, or a statement from the paying agency. Not acceptable: tax returns, W-2s, 1099s, or bank statements.

3. TAX RETURNS

- Most recent federal tax return with all supporting documents (W-2, 1099, and the full packet if a CPA prepared it)

4. BANK & INVESTMENT ACCOUNTS

- Current statements, past 6 months, for every account: checking, savings, stocks, bonds, CDs, money market
- Retirement accounts: IRAs, 401(k), 403(b), and annuities (the whole policy)

This is also our ongoing request: we'll ask for updated statements on these accounts every month until the application is decided.

5. INSURANCE POLICIES

- All policies: long-term care (full policy plus any recent award letters), group life, term life, whole life
- For each policy, a current value letter showing cash value, face value, death benefit, beneficiary, and owner/insured

6. PROPERTY & VEHICLES

- All property deeds: homestead, vacation property, vacant land, or anything with a remaining life estate, plus the most recent property tax statement and homeowners insurance
- Titles and insurance policies for all vehicles, boats, or farm equipment

7. BURIAL ARRANGEMENTS

- Any pre-paid irrevocable funeral agreement, or agreement with a funeral director, burial trust, or burial space
- Burial plot deed and current value from the cemetery

8. SHELTER & LIVING COSTS (LAST 3 MONTHS)

- Rent receipts, utility bills, cell phone bills, real estate taxes, and homeowners or renters insurance

9. MEDICAL EXPENSES (LAST 3 MONTHS)

- Medication co-pays, visit co-pays, privately paid care, or assisted living rent

10. LEGAL DOCUMENTS

- Durable Power of Attorney, Healthcare Power of Attorney, Trust, Will, Promissory Notes, Quit Claim Deeds, Prenuptial Agreement, Marital Property Agreement, or divorce papers, if any of these exist

11. TRANSFERS, GIFTS & SALES IN THE LAST 60 MONTHS

- Proof of anything sold, traded, transferred, or gifted in the last 60 months: property, stocks, bonds, cash, vehicles, or anything else of value
- Include a paper trail showing what was involved and where any money went

12. FINANCIAL SUPPORT TO OTHERS

- Let us know if the applicant financially supports other family members: alimony, child support, or other help given regularly, even if not court-ordered