

ISENHOUR SENIOR SERVICES

DOCUMENTATION REQUIRED FOR MEDICAID APPLICATION

OFFICE 239-542-7366

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| PROOF OF AGE, IDENTITY AND CITIZENSHIP | MARITAL STATUS | PROOF OF RESIDENCE | SOCIAL SECURITY |
|--|-----------------------|---|------------------|
| * Birth/ Baptismal Certificate, *US Passport, | *Marriage Certificate | *Copy of Deed and Tax Statement for Homestead | *Copy of SS card |
| *Photo License, *Military ID, *State ID | *Separation Papers | *Apartment Lease | |
| *Naturalization Papers, *Marriage License for Applicant born outside of the US | *Divorce Decree | *Rent Receipt | |
| *Alien Registration Card | *Spouse's Death Cert. | | |

| HEALTHCARE COVERAGE | LEGAL DOCUMENTS |
|-----------------------------------|-------------------------------|
| *Medicare Card | *Copy of POWER of ATTORNEY |
| *All Other Health Insurance Cards | *TRUSTS |
| **Copy both sides of all cards** | *Wills |
| *Long Term Care Policies | *Holding Mortgage |
| | * Burial / Cremation Contract |

| GROSS INCOME VERIFICATIONS | NOTES |
|---------------------------------|------------------|
| *SS or SSI or SSDI Award Letter | *Support/alimony |
| *Pension Award letter | *Workers Comp |
| *VA Award letter | *Rent (boarders) |
| *Most recent pay stubs | *Dividend checks |
| *Annuity checks | *Unemployment |

| EXPENSES MONTHLY | NOTES |
|---------------------------------|--------------------------|
| *Mortgage | *Support Payments |
| *Rent | *Loan Payments |
| *Home or Renters Insurance | *Unpaid Medical Bills |
| *Water, Sewage, Gas, Oil, Phone | *Copy Nursing Home Bills |
| *Real Estate Tax | *Condo Maintenance Fees |

| ASSETS | | |
|---|---|---|
| *Checking Account Statements (3 months) | *Money Market Accounts | *Vehicles, Boats, RV, etc |
| *Savings Account Statements (3 months) | *Annuities | *Deeds, Tax Statements to Properties Owned |
| *Stock/Bonds Statements (3 months) *Certificates of Deposit | *Business Assets, Cash Settlements Law Suits) | *Proof of Properties Sold or Transferred within the <u>last 5 years</u> |
| *IRA, 401k, 403b, Keogh Accounts Proof of Required Minimum Distribution | *Land/Real Estate Sale Statements | *Life Insurance Cash Value Statements |