

Public Aid/Medicaid Verifications Checklist

Alden Management Services, Inc. (revised 5/2017)

Resident Name: _____ Date: _____

Please bring one copy of the following;
(Spousal cases must provide items for both parties)

- 1. Photo I.D.
- 2. Medicare card (s) - red, white & blue card
- 3. Health Insurance card (both sides) and proof of premiums paid, **must be copy of the bill** (direct payment from a bank account is not accepted by Medicaid).
- 4. Social Security card (s)
- 5. Birth Certificate / Baptismal Certificate for self and spouse (**if under 65 years old**)
- 6. Marriage Certificate or divorce decree
- 7. Death Certificate for resident or spouse, if applicable
- 8. Proof of citizenship or Resident Alien Card
- 9. Power of attorney or guardianship papers
- 10. **15 months** of bank statements for all accounts pertaining to resident and/or spouse**
- 11. Explanation of all deposits/withdrawals/debits over \$500 from all accounts (**must provide copies of cancelled checks for checks written over \$500/proof of source of deposits**)
- 12. Verification of **gross** amount of pensions or other income for resident and spouse – only in the case of social security will bank statements showing a direct deposit suffice. Pensions must be verified with a statement from the pension company.
- 13. Proof of current face and cash values of all life insurance policies
- 14. Itemized pre-paid burial/funeral arrangement and proof that it is irrevocable (if it is)
- 15. Certificate or deed to burial lot
- 16. Current property tax bill and deed of ownership for home or closing papers (if sold in last 5 years)
- 17. Title or registration for all cars
- 18. **15 months** of proof of value of all stocks, bonds, money markets, IRAs, CDs, annuities – all assets must be accounted for resident and/or spouse and payout amount if sold in last 5 years**
- 19. Check stubs for the past 3 months, if resident or spouse is or was employed
- 20. Past 5 years of income tax returns
- 21. Outstanding medical bills

Other Notes: _____

** It is possible that up to 60 months may be requested from the state.

If you have any questions, please call:
Medicaid Reimbursement Specialist
Alden Management Services, Inc.
– cell phone