



**MEDICAL ASSISTANCE PLANNING
WHAT TO BRING WITH YOU**

PROOF NEEDED	SUGGESTED ITEMS TO GIVE PROOF
Social Security Number (SSN) (also spouse, if married)	Social Security card, Social Security Administration award letter, or receipt for SSN application.
Citizenship, Alien Status, Identity, Age, and Relationship (also spouse, if married)	Birth certificate, adoption papers, hospital or medical records, draft or military card, baptismal certificate, alien registration card, US Immigration Form I-94, passport, school records, court records, marriage certificate, divorce or separation paper, or death certificate.
Disability and Blindness, or Incapacitation	Award letter from Social Security Administration or doctor's statement.
Checking Accounts	Checkbook or current credit union or bank statements.
Savings Accounts	Passbook or current credit union or bank statements.
Certificates of Deposit, Retirement Accounts (including IRA and Keogh accounts), Stocks or Bonds (including U.S. Savings Bonds) and other Savings or Investments	Statements from stockholder, copy of bonds, or current bank, credit union or savings and loan statements.
Trust Funds	Trust agreement or court order.
Burial Assets	Burial trust agreement, contract or deed for vault, casket or place, and statement showing current value.
Vehicles (cars, trucks, boats, campers, snowmobiles, and other motorized vehicles)	Car title and registration, written statement from car dealer, loan papers or sales receipt, or State Division of Motor Vehicle statement.
Real Estate	Deeds or titles, real estate receipts or tax records and statement of current value from local business.
Life Insurance	Life insurance policy and the insurance company's statement on the policy's cash value.
Property, land, stocks, bonds, cash, vehicles or anything of value that has been sold, traded, transferred or given away within the last 60 months	Deeds, sales agreement, contract, or title, or dated and signed sales slip.

Employed persons - Earned Income	Check stubs or signed statement from employer that included gross earnings and date pay is received.
Self-employed - Earned Income	Income tax returns (including Schedule C, E, F, or SE) or bookkeeping records.
Unearned Income, such as: Unemployment Insurance Disability Insurance Social Security Retirement Veteran's Benefits Military Allotments	Award letter or copy of last check
Student Loans, Grants, Scholarships and Fellowships	Financial award letter or receipt from the Financial Aid Office showing date aid received and amount.
Medical Expenses - Out of Pocket	Receipts/Statements showing payments for co-payments, prescription drugs, medical equipment, etc.
Residence and Shelter Costs	Rent receipt with landlord's name and phone number on it, lease or mortgage papers, or real estate tax statement.
Utility expenses	Current utility and phone bills or statement from utility company.
Shared Shelter and Utility Expenses	Statement that includes the total shelter and utility costs, and the amount each member pays, signed by household members that share the expenses.
Care Facility Expenses	Current billing showing care facility monthly charges or statement from care facility showing charges.
Child Support Received or Paid	Court order or payment record.
Child Care Expenses	Signed statement from the child care provider or receipts and bills.
Health Insurance (other than Medicaid)	Medicare card, health insurance ID card, and health insurance premium statement.
Durable Power of Attorney	Signed document with all responsibility changes and amendments, if applicable.
Health Care Power of Attorney	Signed document with all responsibility changes and activation form, if applicable.
Will	Signed document and codicils, if applicable.
Pregnancy	Statement from doctor with estimated due date.
Unemployed Parents	Earnings statement signed by employer, income tax statements, Job Service statement, or payroll check stubs for the last three years.
School Enrollment or other Status	Letter from school, report card, diploma, GED certificate, or high school equivalency diploma.

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