

CHECKLIST OF DOCUMENTS NEEDED – MEDICAID PLANNING

- _____ 1. One of the following: birth certificate, marriage certificate, Social Security card, Driver's License, OR Kansas ID card for applicant and spouse. **
- _____ 2. Medicare card(s) for applicant and spouse. **
- _____ 3. Medicare supplement insurance card(s) for applicant and spouse, plus premium statements. **
- _____ 4. Medicare Part D Prescription Drug insurance card(s) for applicant and spouse, plus premium statements. **

**** Please note that KanCare requires a copy, front and back, of Medicare and all other health insurance cards (Medicare Supplement and Part D) for the applicant and spouse.**

- _____ 5. **All current financial statements, including the following:**
 - _____ Checking accounts
 - _____ Savings accounts
 - _____ Credit union accounts
 - _____ Certificates of Deposit
 - _____ Individual Retirements Accounts (IRAs)
 - _____ Brokerage accounts
 - _____ Any/All other types of financial accounts
- _____ 6. **If married, please provide the financial statements listed in item #5 which cover the entire month of entry into the long term care facility.**
- _____ 7. Funeral or burial plans for either spouse, if any.
- _____ 8. Burial plot ownership for either spouse, if any.
- _____ 9. Titles to all motor vehicles.
- _____ 10. Copy of most recent Federal Income Tax Return.
- _____ 11. For life insurance policies, long term care insurance policies, and/or annuity contracts—please provide the most recent statement showing value and terms of the policy or contract.
- _____ 12. Durable Power of Attorney for business/financial decisions for the nursing home resident.
- _____ 13. If married, copies of community spouse's monthly housing expenses, including rent or mortgage payments, real estate taxes, monthly maintenance fees, homeowner's insurance and homeowner's association dues.
- _____ 14. The date of the Medicaid applicant's admission into a long term care facility.
- _____ 15. The date of admission to a hospital immediately prior to transfer to a long term care facility.
- _____ 16. Documents providing proof of all income including the following, if applicable:
 - _____ Annual Social Security benefit statement showing gross benefit and all deductions
 - _____ Pensions (including, for example, KPERS)
 - _____ Trust or Annuity income
 - _____ Minimum distributions from IRAs, if required
 - _____ Railroad Retirement
 - _____ Veteran's Benefits
 - _____ Real estate income from contract sale or rental income
- _____ 17. Property tax statements indicating appraised value of all real property.
- _____ 18. Deeds for all real estate owned, if possible.