

# APPLYING FOR MEDICAID COMMUNITY CARE WAIVER

Documents that you will need to provide when making a Medicaid application:

When you apply for Medicaid you will be asked to provide personal papers that will prove who you are, where you live, what you own, how much money you receive each month, where it comes from and how much you spend on living expenses. The following information explains what documents you should provide.

## Who are you?

You will be asked to show proof of your identity, age, citizenship and marital status. Please provide one document from each column. Be aware that some documents will give proof for more than one category; a U.S. Passport will prove your identity, age and citizenship:

<u>Identity</u>	<u>Age</u>	<u>Citizenship</u>	<u>Marital Status</u>
US Passport	US Passport	US Passport	Marriage License
Driver's License	Birth Certificate	Birth Certificate	Divorce Decree
State issued I.D.	Driver's License	Naturalization Papers	Death Certificate
Voter Registration Card	Baptismal Certificate	Alien Registration Card	Separation Papers
Work or School I.D.			
Clinic / Medical Card			
Medicare Card (excludes from citizenship and identity requirements)			

## Where do you live?

Any of the following documents will provide proof of New Jersey residency:

Copy of Deed to Home	Apartment Lease	NJ Driver's License
Rent Receipt	Current Utility Bill	Statement from Landlord

## What do you own?

Many people do not realize how much they own. Ownership is not limited to homes and automobiles. It can include cash values of life insurance policies, trust fund accounts, burial plots and many other things. In order to present the clearest picture of your financial situation, please bring copies of any of the following items:

Deeds to any Property Owned	Property Tax Statements	Stocks or Bonds
Certificates of Deposit	All Life Insurance Policies	Deed to Burial Plots
Pre-Paid Funeral Arrangements	Trusts or other Holding Instruments	Special Needs Trusts
Annuities	401k / 403b Retirement Accounts	Keogh Accounts
IRAs	Mortgages	Automobile Registrations
Other Vehicles (Boat, Trailer, etc.)	Christmas / Vacation Club Accounts	Burial Accounts
Mobile Home	Business / Real Estate Partnership Papers	

**The last three (3) months of statements\* for any financial accounts closed or opened within the past 5 years and or any financial passbooks from accounts such as:**

Checking Accounts	Savings Accounts	Credit Union Shares / Accounts
Money Market Accounts	Any Transfers (money or real estate)	

**\*You may be asked to provide statements for the past 5 years if there has been money removed or transferred from your accounts for any reason.**

## **How much do you make?**

The next area that you will be asked to provide documentation for is your monthly income. The income can be earned, such as receiving a pay check, or unearned, receiving interest from an investment account. Listed below are some examples of documents that can prove how much money you receive each month and its source. **If you were required to file federal income tax returns you must bring in copies of those returns with all attached schedules, for the past 5 years.**

NOTE: All applicants must provide their Social Security Card and Medicare Card:

Most Recent Pay Stubs	Self-Employment Statement	Income Statement from Employer
Support / Alimony Payments	VA Check Stub	Social Security Check Stub
Unemployment Check Stub	SSI Payments	Temporary Disability Check Stub
Dividend Checks	Worker's Compensation Check Stub	

## **What are your living expenses?**

How much money does it cost you to live each month? The expense of maintaining a house or renting an apartment can account for a large part of your monthly income. Some of the documents that you can provide to the Board of Social Services worker assisting you are, but not limited to:

Rent Receipts	Mortgage Statements	Real Estate Tax Bills
Telephone Bills	Gas / Oil Bill	Electric Bill
Water / Sewer Bill	Installation / Connection Charges	Renter / Home Owner Insurance
Health Insurance Bills	Unpaid Medical Bills	Outstanding Loans

In addition to the documentation listed in the categories above please, please bring any documents that show you have designated a **POWER OF ATTORNEY** or a **THIRD PARTY SIGNATOR** who has a signed Authorized Representative form to help you with your finances. You may be asked to provide information in addition that which is listed in this document. The reason additional information may be asked for is to insure that your Board of Social Services has the most complete understanding of situation as possible. You will be helping them to provide you with the most suitable care for your circumstances.

If you are applying for an incapacitated individual, please include any **GUARDIANSHIP** documentation.