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DOWLEY LAW P.C

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**MEDICAID/MASSHEALTH**

**APPLICATION CHECKLIST**

The following information is needed for the application for Medicaid/MassHealth (if there is a spouse then information must also be provided for the spouse):

1. Copies of Birth Certificate or Immigration Card (both sides) or Naturalization Papers. If you have these, this is helpful, if you do not, then are not an absolute. A copy of their marriage certificate, if applicable.
2. Copies of Social Security Card(s) and Health Insurance Card(s) (both sides) and copies of most recent Health Insurance premium statements. As long as you have the Social Security number of the applicant, then the card is not always required.
3. Copies of Social Security checks, or if direct deposited, copies of two most recent statement showing deposit (if available, the Social Security notices stating amount, including any deductions).
4. Copies of any other income currently received (check stub, verification letter, will need more than bank statement showing direct deposit). (Pension(s), etc.).
5. Copies for the last 60 months of ALL bank books and/or bank/financial statements, indicating the current balances to show exact current assets. This includes ALL accounts opened and closed in the past 60 months. (The applicant must be below \$2,000.00 in countable assets. If there is a spouse, then they must be below \$130,380.00 in countable assets. They may each have an additional \$1,500.00 savings "Burial" account. We will discuss the spend-down in greater detail as part of our planning.)
6. Copies of life insurance policies indicating face value, cash value, and policy number. Only life insurance without a cash value may be kept or one that has a cash value of \$1,500.00 or less. We should discuss any other life insurance as par of our planning before any steps are taken.
7. Copies of any pre-paid burial plan and/or prepaid irrevocable funeral account if any. Please know that all contracts must be irrevocable in nature or MassHealth will count them as a countable asset. Flowers are the only item that MassHealth does not accept prepayment for relating to funeral. All other expenses may be prepaid.



8. Copies of the registration of any automobile (and proof of outstanding loan balance for the automobile, if applicable). Copies of lease information if the car is leased.
9. Copies of Deeds to any property owned/purchased/sold in the past five years. This includes any life estates or partial interests in property located in MA or elsewhere.
10. Copies of any Trusts of which the applicant or the applicant's spouse is a Grantor or a Beneficiary, presently or in the past 60 months.
11. Copies of Health Care Proxies, Durable Powers of Attorney, and Wills.
12. A list of gifts, if any, made in the past 60 months; with a detailed explanation of the gifts (amount, date, who it was to and what it was for).
13. Last two years of tax returns.
14. Most recent utility charges, real estate taxes, and homeowner's insurance, if the applicant owns a home.

**Please Note: Failure to provide full and complete information may result in an incomplete application and a denial of MassHealth coverage and benefits. It is not the responsibility of this office to obtain the necessary information.**

