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## Document Checklist for Public Benefits Eligibility

**Categorical Eligibility:** We must prove your status regarding certain matters. Please provide us with at least one document in each of the following categories. **More is better** so if you have additional documents, please provide them.

**Citizenship:**

- Passport
- Birth Certificate
- Naturalization papers
- Alien registration card
- Adoption decree

**Age:**

- Passport
- Birth certificate
- Driver's license
- Baptism certificate

**That you are you:**

- State issues photo ID
- School ID
- Military ID

**Marital status:**

- Marriage license
- Separation Order
- Divorce Order
- Spouse death certificate

**Medical Eligibility:** After you are admitted to a nursing home, or if you need home health care, then proof of your medical condition will be necessary. We will need you to sign a release so we can get that information.

**Financial eligibility: Please provide all of the following that apply to you or your spouse:**

**Resources (Assets with value):**

- Checking accounts
- Savings accounts
- Money markets
- CDs
- Stocks or bonds
- Annuities
- Retirement accounts (e.g., 401(k) or IRA)
- Deeds to land and buildings
- Titles & registration to vehicles or mobile homes
- Debts people owe you
- Trusts of any kind that involve you
- Life insurance (all policies)
- Burial assets (e.g., contracts, accounts, plots)
- Anything else you believe has value. The Medicaid rule is that if it's not exempt, then it counts toward eligibility so err on the side of caution and tell us.

**Monthly Income:**

- Recent check from employment
- Social Security letter (you get one each year)
- Railroad Retirement
- Disability Income
- Proof of pension or retirement income
- Rent payments
- Support, alimony
- VA Award letter
- SSI award letter
- Debt payments (money people owe you)

**Other things we need:**

- Current Last Will & Testament
- Power of Attorney/Guardianship papers
- Social Security Card
- Medicare card (front and back)
- Other health insurance card & premium amount

**As we work for you, other information may be helpful. Please provide:**

- ID cards for both spouses
- Utility bills
- Property tax bills
- Mortgage statement or rent bill
- Any other insurance
- Evidence of any medical debt

If you have any questions, please let us know. Call at (706) 428-0888 or email [info@mcguffey.net](mailto:info@mcguffey.net).