



**LIST OF DOCUMENTS TO SUBMIT**  
(Submit Photocopies Only Except Where Noted)

- 1) Medicaid Card (*if already on New York state community Medicaid*)
- 2) Social Security Card
- 3) Medicare Card (*see also #9 below*) \*
- 4) Proof of Enrollment in Medicare Part D (*Prescription Drug Plan*)
- 5) Disenrollment from HMO and reenrollment on to Medicare Primary, **only if** Medicare is not Primary (*submit written confirmation from HMO indicating effective date of disenrollment*)
- 6) Private Health Insurance (example: AARP, Blue Cross, etc.)  
*ID Card(s) and Current Bill Paid and Check (front & back) used to pay said Bill*
- 7) Current Year Social Security Award Letter (for both spouses, if applicable)  
*Obtain from local Social Security Office and ask preferably for code "TPQY"*
- 8) Current Year Pension Award Letter/Union Benefits Letter, (for both spouses, if applicable)  
*Letter must state **gross and net** amount monthly*
- 9) Proof of U.S. Citizenship or Permanent U.S. Residency (Green Card) \*  
*Birth Certificate or US Passport or Cert. Of Naturalization (must show original) or Green Card or Voter Registration or Military Discharge Papers or Medicare Card or Letter from Social Security stating date and place of birth in the U.S.*
- 10) Proof of Age & Identity (*document must have date of birth and photo; may be same as #9*) \*
- 11) Marriage Certificate
- 12) Death Certificate of Spouse or Divorce Decree
- 13) Current (w/in the past 6 months) Utility Bill (*submit only the page showing service address*)
- 14) Current (w/in the past 6 months) Telephone Bill (*submit only the page showing service address*)
- 15) Proof of Residence from Feb. 1, 2006 to present (must account for multiple residences, if any)
  - *if renting, submit Lease Agreement(s) and current rent receipt*
  - *if coop apartment, submit Stock Certificate and a Statement from a licensed local Realtor or Coop Managing Agent re: the property's current market value*
  - *if house or condo, submit Recorded Deed and a Statement from a licensed local Realtor re: the property's current market value*
- 16) Bank &/or Investment &/or Annuity Accounts (for both spouses, if applicable)  
*Statements and Passbooks (all pages) for **all existing and closed accounts** from Feb. 1, 2006 up to the present. **Also**, each deposit and withdrawal of \$1,000 or more must be documented as follows: **for deposits**, submit copy of deposit slip and check(s) deposited, if any; **for withdrawals**, submit copy (front & back) of cancelled check(s) or bill(s) for which the withdrawal was used*  
**Please DO NOT SUBMIT back to back copies; submit only one page per sheet of paper..**
- 17) Trust Agreement (if any, whether Revocable or Irrevocable)  
*Submit all pages of the Agreement, including Schedule A and the Trust's Tax Returns for the past five (5) years and all bank & investment accounts under the Trust for the past **five years***
- 18) Individual Income Tax Returns for the Past 3 Years (*Federal form only, all pages & Schedules*)
- 19) Other Resources: Life Insurance (*submit policy and a statement from insurance company Re: the policy's current cash surrender value*); Stocks/Bonds (*submit certificates*)
- 20) Veteran Status Information (*if applicable, submit Military Discharge Papers/Honorable Dismissal; also, submit current pension award letter, if any*)
- 21) Irrevocable Burial Trust - only if done on or after Feb. 1, 2006 (*All pages of the Trust and cancelled check (front & back) used to pay for the Trust*)

\* If submitting a non-photo document, **must also submit** acceptable proof of identity such as: Driver's License or Passport from foreign country or photo I.D. issued by an employer, school or government agency.

**Questions?** Call the Office of the Medicaid Coordinator, Hebrew Home for the Aged at Riverdale, Tel. (718) 581-1332 / 1324 / 1328. Fax (718) 549-0721.

(Revised April 2009)

04/16/09