



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 **for the Past 5 Years** - 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** for the **Past 5 years** 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 within the past 5 years *(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 June 2011)

04/16/09