

Medicaid (MassHealth) Verifications Checklist

Anthony V. Feroci, Jr., Attorney At Law
Estate and Trust Planning
Elder Law
Asset Protection

THE FOLLOWING VERIFICATIONS ARE NEEDED FOR THE FILING OF A MASSHEALTH APPLICATION. PLEASE PROVIDE AS MUCH AS YOU CAN FOR OUR INITIAL MEETING (disregard those that do not apply).

1. Copy of birth certificate;
2. Copies of life insurance policies and statements verifying cash surrender values (if any);
3. Copies of any real estate deeds;
4. Copy of most recent property tax bill and mortgage bill, if any;
5. Copies of any existing wills, powers of attorney, health care proxies, trusts, if any;
6. Copies of **bank account, stock, bond, IRA and annuity statements** going back 60 months. If you do not have these records you will need to request them from each bank/credit union. **Please provide current statements at the start of our work;**
7. Explanation of any deposits or withdrawals of \$1,000 or more in last 5 years;
8. Copy of Social Security Card and check, bank statement or other statement showing current Social Security benefit for applicant;
9. Copies of health insurance cards including Medicare and any supplemental policies (also verification of premium);
10. If applicant rents, a copy of most recent rent receipt;
11. Copy of homeowners/renters insurance;
12. Copy of monthly income checks, or statement from income sources (Social Security, pensions, etc.);
13. Listing of all contents of safe deposit box;
14. Copy of automobile registration;
15. Copy of prepaid burial/funeral arrangements, if any;
16. Copies of federal income tax returns for last two years;
17. Nursing Home Screening Form- to be obtained from nursing home; and
18. Statement from nursing home verifying amount of money privately paid to date.