

## Single Person Checklist of records required by DHS

**ALL items below (if they apply to you) are REQUIRED by DHS**

- ☐ Photo ID driver's license or state issued ID card
- ☐ Birth record – if available
- ☐ Medicare card and Social Security card (if there is no SS card, then the SS 1099 for tax purposes shows their SS number)
- ☐ Insurance cards (both front and back) from ANY health insurance plan along with 2025 premium verification notices
- ☐ Social Security Administration 2025 Benefit Verification Letters
- ☐ Pension or other income sources Benefit Verification Letters, stating gross monthly amount
- ☐ Annuity contracts owned by you for which you may receive payments
- ☐ Life insurance policy verification letters showing current death benefits, cash surrender values and premium amount. Proof of any surrendered life insurance policies.
- ☐ Recent bank statements on ALL accounts & ALL PAGES on which name appears (checking, savings, money markets, CD'S) for the 3 months prior to Medicaid effective date: \_\_\_\_\_
- ☐ Recent statement from your brokerage account and/or Computershare or Shareowner online statements and/or bond information.
- ☐ Closing statements for property sold within the past 2 years
- ☐ A Kelley Bluebook (KBB) or NADA trade-in value report of each vehicle, mobile homes, boats, trailers, ATV's, campers or RV's etc. registered in your name.
- ☐ Preplanning Funeral arrangements and cemetery plot documentation
- ☐ Mortgage statement and/or promissory notes, or contracts, *for which you receive payment*
- ☐ Financial Power of Attorney document
- ☐ Current Verification letter Long term care insurance benefits (if applicable)
- ☐ Current Invoice/Billing Statement from the Care Center.
- ☐ Military discharge papers-DD214 ( if applicable)
- ☐ Miller Trusts (if applicable): Banks new account form & complete Miller Trust document