

BASIC Documentation Needed to Apply for Medicaid and Medicare Savings Programs

You MUST bring Copies of ONE of the documents listed in each category (if applicable) to see if you are eligible for Health Insurance. Discuss this with the Enroller helping you with your application.

If an U.S. citizen – SKIP #s 1 – 2

1. **Proof of date of birth** U.S. passport or naturalization certificate
2. **Immigration Status** – if applicable – (examples: INS form I-551 (green card); INS form I-94; INS form I220B; INS I-210 letter; INS form I-181; Other INS documentation, or correspondence to or from the INC, that shows that the alien is PRUCOL.
3. **Photo ID** (examples: driver's license, library card, student ID card)
4. **Social security numbers** for ALL members of your household
5. **Proof of residency/home address** – must be dated within 6 months of the application
 - Lease / Letter / rent receipt
 - Property tax record or mortgage statement
 - Government ID with address
 - Utility Bill (gas, electric, phone, cable, fuel or water)
 - Driver's License (issued 6 or more months prior)
 - Postmarked envelope or postcard (NO PO Boxes)
6. **Proof of Income** (examples of several types of income):

Wages and Salary

- Paycheck stubs (must have employee and employer's name)
 - Four most recent consecutive weekly checks
 - Two most recent consecutive bi-weekly/semi-monthly checks
- Verification of employment form – if employer writes employer letter, it must be on Business letterhead.

Self-Employment – This includes those who are contractors/1099 employees.

- Signed and dated income tax returns with all corresponding schedules/statements.
 - 1040 pg. 1 (signed) and pg. 2.
 - Schedule 1
 - W-2s (must have all) – *W-2 Summaries not acceptable.*
 - Schedule E pg. 1
 - Schedule E pg. 2
 - 1065 (partnership) with all K-1s. If amount on line 20, need a corresponding statement.
 - 1120-S (S-Corp) with all K-1s. If amounts on line 19, need corresponding statement.
- 1 month business financial record

Unemployment

- Copy of payment history downloaded from NYS Unemployment Website (<https://ui.labor.state.ny.us/UBC/home.do>)
- Monetary determination letter (only accepted if no payment has been received yet)

Social Security

- Most recent award or denial letter/certificate
- Must be dated within the year of application.

Please note that consumers must bring copies of all applicable documents. The Facilitated Enroller may request additional documents.

- Call Social Security to request an award letter. 1-800-772-1213 or ssa.gov

Worker's Compensation

- Most recent award letter.
- Most recent check stubs.
- Letter telling gross weekly amount.

Child Support/Alimony

- Copy of payment history downloaded from Child Support Website <https://newyorkchildsupport.com/>
- Letter listing the monthly amount of child support and the name(s) of the child(ren), signed and dated from the person providing the support with contact address and phone number listed.
- Court decree for child support (must be dated within the year of application)

Income from Rent or Roomer/Boarder

- Signed and dated letter from the boarder, roomer or tenant with the monthly amount paid.
- Copy of most recent check or check stub.

Monetary Support from Family Members/Friends

- Signed and dated letters from people providing support with contact address, phone number and the monthly amount given.

Interest/Dividends/Royalties – no 1099s from taxes accepted.

- Most recent statements from banks, credit union, or financial institution
- Signed and dated letters from broker or agent on letterhead.

Private Pensions/Annuities

- Most recent statement from pension/annuity: Showing current gross monthly amount.

Veteran's Benefits

- Most recent award or denial letter/ correspondence from Veterans Administration
- Veteran's Survivor Pension – 1800-827-1000
- Most recent check stubs.

Military Pay

- Most recent award letters.
- Most recent check stubs.

7. Health insurance cards - copies of front and back of all current cards.

8. Copy of Medicare card - front and back. 1-800-633-4227.

9. Health Insurance premiums

10. Last water bill

11. Divorce Decree / Divorce Certificate

12. If Widowed – spouse's death certificate

13. Proof of previous medical bills – if applicable – (examples: copies of the unpaid bills from the health care provider; proof of the paid bill from health care provider)

14. Proof of resources:

- 3-months Bank statements – all checking and savings account
- Retirement Account/ IRA – pay out and balance
- 60 months / 5 years Bank Statement for Nursing Home Application
- Life insurance policies: telling the current face and cash value.
- Annuities, stocks, bonds, mutual funds
- Trust Accounts – full statement
- Burial Assets/Burial Contract

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