



Dowley Law

P: (781) 395-0020

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www.dowleylawpc.com

MEDICAID/MASSHEALTH APPLICATION CHECKLIST

The following information is needed for the application for Medicaid/Masshealth (if there is a spouse then information must also be provided for the spouse):

1. Copies of Birth Certificate or Immigration Card (both sides) or Naturalization Papers and a copy of their marriage certificate, if applicable.
2. Copies of Social Security Card(s) and Health Insurance Card(s) (both sides) and copies of most recent Health Insurance premium statements.
3. Copies of Social Security checks, or if direct deposited, copies of two most recent statement showing deposit (if available, the Social Security notices stating amount, including any deductions).
4. Copies of any other income currently received (check stub, verification letter, will need more than bank statement showing direct deposit). (Pension(s), etc.).
5. Copies for the last 60 months of ALL bank books and/or bank/financial statements, indicating the current balances to show exact current assets. This includes ALL accounts opened and closed in the past 60 months. The applicant must be below \$2,000.00, the spouse must be below \$117,250.00. They may each have an additional \$1,500.00 savings "Burial" account.
6. Copies of life insurance policies indicating face value, cash value, and policy number.
7. Copies of any pre-paid burial plan and/or prepaid irrevocable funeral account if any.
8. Copies of the registration of any automobile (and proof of outstanding loan balance for the automobile, if applicable).
9. Copies of Deeds to any property owned/purchased/sold in the past five years.
10. Copies of any Trusts of which the applicant or the applicant's spouse is a Grantor or a Beneficiary, presently or in the past 60 months.

11. Copies of Health Care Proxies, Durable Powers of Attorney, and Wills.
12. A list of gifts, if any, made in the past 60 months.



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13. Last two years of tax returns.
14. Most recent utility charges, real estate taxes, and homeowner's insurance.

Please Note: Failure to provide full and complete information may result in an incomplete application and a denial of Masshealth coverage and benefits. It is not the responsibility of this office to obtain the necessary information.