

### Documents Required For MO HealthNet Planning

1. Social Security cards
2. Medicare card and any additional health insurance card(s)
3. Current health insurance premium verification (i.e., a billing statement)
4. All life insurance verification with verification of their current cash surrender value(s). Please note that the face value does not correspond with the cash value. Please bring a copy of the life insurance policy to your appointment.
5. Copies of prepaid burial plans with verification of their irrevocability, if applicable.
6. Copies of bank statements for the month of application and the last three months including copies of cancelled checks.
7. Verification of the disposition of all large checks (over \$200)
8. Verification of any recently closed accounts, showing a zero balance (in the previous three months)
9. Copies of Powers of Attorney, guardianship, conservatorship or trust papers.
10. Complete copies of contracts of all annuities.
11. Verification of the values of all CD's, stocks, bonds, and other investments (complete statements).
12. Real estate deeds and verification of the amount owed, if any.
13. Car titles(s).
14. Verification of the gross Social Security amount and the gross amount of all other pension(s).
15. Verification of all transfers of property over the last 5 years.
16. Birth verification.
17. If under 65 then provide one of the following:
18. Verification of Social Security Disability; verification of Supplemental Security Income or a complete list of all doctors and hospitals to obtain medical records from.

#### In addition, the following items are also needed in cases with spouses:

1. Marriage verification.
2. Copies of last three utility bills with the address.
3. Verification of rent or house payments.
4. Verification of condominium maintenance fees, if applicable.
5. Most recent real estate tax and home owner's insurance payments.
6. Verification of all gross income for the community spouse (including interest and dividends).
7. Verification of the first 30 days of institutionalization (defined as the first 30 continuous days in a hospital and/or vendor certified bed in a nursing facility).
8. Verification of all the value of all assets for the month of institutionalization if different from the month of application.

#### In addition, if there are any eligible dependents please provide the following:

1. Social Security card(s).
2. Birth certificate(s)
3. Verification of all of the dependent's income.
4. Copy of the most recent income tax statements verifying dependent status.