



MaineCare Application Worksheet

When an individual applies to the Maine Department of Health and Human Services (DHHS) for MaineCare benefits, the individual must produce verification of all the issues relevant to eligibility for the requested benefits. This Worksheet outlines the information and documentation required by DHHS on an application for MaineCare long-term care benefits.

DOCUMENTATION FOR THE MAINECARE APPLICATION

Please deliver the requested items to Rudman Winchell. If you have trouble locating any of the items, let us know. We have experience in tracking down all of the types of items that DHHS requires. You may bring photocopies to the office or you may deliver originals that we will photocopy for you.

- Birth certificate for applicant
- Social Security card for applicant and spouse
- Medicare card(s) for applicant and spouse
- Other health insurance card(s) for applicant and spouse
- Verification, from the source, of all health insurance premiums paid on behalf of applicant, including proof of the amount and frequency of the premium payments
- Statements dating back 60 months, for any accounts on which the name of applicant or spouse have appeared, including closed accounts, and including checking accounts (along with check images of \$500 or more), savings accounts, CDs, money markets, IRAs, qualified retirement accounts, investment accounts, stocks, savings bonds, brokerage accounts, etc.
- Stock certificates and copies of bonds owned by applicant or spouse
- Annuity contracts owned by applicant or spouse and verification from the company of cash surrender values for all contracts
- Life insurance policies owned by applicant or spouse and verification from the insurance company of cash surrender values for all policies
- Statement of amount held on behalf of applicant at facility (i.e., patient account)
- Deeds, property tax bills, insurance premium statements, and details about any current mortgages or loans for all property in which applicant or spouse own any interest
- Title, registration, and current mileage of any motor vehicle owned by applicant or spouse, including motorcycles, campers, ATVs, snowmobiles, and boats
- Verification, from all sources, of gross income received by applicant or spouse including pensions, Social Security income (i.e., *annual Your New Benefit Amount letter*), retirement or annuity income (i.e., most recent check stub), rental income, etc., as well as any deductions from gross income (*Please note: direct deposit on a bank statement and tax forms are not sufficient verification.*)
- Income tax returns including 1099 forms filed by applicant or spouse for the past 5 years
- Mortuary trusts and deeds to burial plots for applicant and spouse
- List of contents of safe deposit box
- Most recent household bills and expenses including electrical, heating, cable and internet, etc.