

## THE BENEFIT BANK – DOCUMENTS CHECKLIST

When you submit your application for benefits, you must give the assistance office **copies** of documents to prove your information. **If you are not able to provide these documents, tell the assistance office, and ask for help getting them.** You should also bring these documents to The Benefit Bank to help you complete your application. If you are applying for retroactive Medicaid, you will need to supply the assistance office with verification for the past three months.

### For each applicant

\* See additional Proof of Citizenship and Identity

#### Document for Medical Assistance

- Driver's license or state-issued ID card
- Social Security Card or proof of application
- Insurance cards/documents (auto, life, health)
- Medical verification of pregnancy and due date
- Adoption or custody papers
- Marriage certificate
- School enrollment information
- Child care provider's address and phone number
- Doctor's information for disability verification a document from a government agency verifying disability
- If someone not living in your home is a parent of children in your household: that parent's contact information, SSN, and contact information for the most recent employer

#### All household income from LAST 30 DAYS:

- Pay stubs, W-2 forms, tips, commissions
- Dates of employment, hours worked, & payday
- Odd job income
- Military pay and allotments
- Training Allowances
- Self-employment records and tax forms (Schedules C or F)
- Room and board
- Retirement benefits, 1099 forms
- Child support and alimony/spousal support
- Interest and dividends from bank accounts and other investments
- Gifts from friends or relatives not in household
- Scholarships, grants, fellowships, stipends
- Sick, maternity, and disability payments
- Non-wage income such as union pay, stipends, reparation payments, trust fund payments, and lawsuit proceeds

*\*\*If someone has no income, statement from landlord or other person except family members*

#### All household CURRENT assets/resources:

\* Not needed for Child Care Subsidies

- Real estate
- Vehicles
- Business assets
- Prepaid funeral expenses and burial plots
- Trusts and life estates

- Valuable personal property
- Statements showing the amount of current bank accounts, stocks, bonds, and mutual funds
- Value of cash on hand

#### Immigration information for each applicant:

- Green card or Visa (Form I-551)
- Arrival-Departure Documents (Form I-94)
- Employment Authorization card, or other USCIS documentation
- Previous immigration status
- Dates of obtaining immigration statuses
- Social Security Wage Information (Qualifying Quarters)

#### Assistance from other agencies or states:

- Cash Assistance
- Food Stamp Assistance
- Housing Assistance (i.e. HUD)
- Cash Care Assistance
- Energy assistance benefits (LIHEAP and Weatherization)
- Social Security Administration (SSI, SSDI), Veteran's Administration, and Railroad Retirement Board
- Medicare (bring cards)

#### Proof of all RECENT expenses:

*\*For Food Stamps:*

- Utility bills/receipts with name and address of provider or receipts from your landlord
- Rent receipt, lease agreement, or letter from landlord listing rent; landlord's contact information
- Mortgage receipt or contract
- Home insurance and property tax bills/receipts
- Regular monthly medical expenses

*\*For Food Stamps and Medical Assistance*

- Child, disabled adult or elderly care bills/receipts
- Alimony/spousal support paid
- For Medical Assistance: Unpaid medical bills from the past three months.
- For energy assistance: proof of a crisis: letter of disconnection for utility, letter of eviction for failing to pay utility bill, etc.

