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Medicaid Application Checklist

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Applying for Medicaid, or Medical Assistance, for long-term care costs can be daunting. The following checklist provides a list of items you or your loved one will need to complete the Medicaid Application in Pennsylvania.

The Department of Human Services, the agency that administers Medicaid in Pennsylvania, allows applicants to apply via their online COMPASS system. Applicants can also complete this application form and mail or bring it to their local county assistance office. In Erie County, the office is at 1316 Holland Street in the City of Erie.

What information is needed for a Medicaid application?

In order to successfully complete a Medicaid application in Pennsylvania, the following items are needed:

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☐	Proof of Identity, Birth Certificate, and Social Security Card
☐	Power of Attorney (if applicable)
☐	Medicare Card / Medical Insurance Card (and proof of current premium)
☐	Spouse Info: Divorce Decree or Death Certificate, if applicable
☐	Social Security/SSI Award Letter for Current Year; Monthly Pension or Retirement Benefit Checks; Info on any other Income
☐	Bank Account Information - All Accounts (statements from past 5 years, and copies of any checks written for over $500)
☐	Cash on Hand / Stocks / Bonds / Trusts / Annuities / Mutual Funds / Certificates of Deposit
☐	Christmas/Vacation Club
☐	Life Insurance Policies AND 401k/IRA/Deferred Compensation Accounts
☐	Burial Reserve Agreement / Contract
☐	Vehicles AND Real Property Owned by Applicant and/or Spouse (deed for properties owned OR transferred in last 60 months)
☐	Federal and State Tax Forms and All Attachments (from past 5 years)
☐	Information regarding any other GIFTS given in the last 60 months

While this list is fairly exhaustive, there could be other unique issues that could affect your or your loved one's Medicaid application. Our Elder Law team can help you work through these issues in order to prepare a complete and correct Medicaid application.

A separate discussion is HOW to qualify for Medicaid.

Before You Apply for Medicaid

In addition to gathering all of the items and information noted above, savvy planners will start early. The sooner you start to think about potential long-term care costs, the more assets can be preserved. Our team can advise on smart ways to transfer assets and use other estate planning tools to protect wealth, qualify for Medicaid and/or pay for long-term care costs.

It Is (Almost) Never Too Late

It is almost never too late to protect your assets. Even when an individual is already (or about to be) residing in a long-term care facility, we can advise on techniques to preserve remaining wealth.

Navigating long-term care costs is stressful. Our team has the knowledge *and* compassion to help individuals and families plan for the future and gain peace of mind.

Related Links:

Elder Law Practice Area
Elder Law FAQs

If you have questions about Medicaid eligibility or have other Elder Law or Estate Planning concerns, please contact one of our Elder Law Attorneys or call 814-459-2800.

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