

DOCUMENTS NEEDED FOR A MASSHEALTH APPLICATION

1. Copy of Driver's License or Passport for applicant and spouse
2. Social security card for applicant and spouse
3. If not a US citizen, need permanent resident card or alien number for applicant and spouse
4. Deed for any properties where the applicant or applicant's spouse is on title
5. Two years of income tax returns with supporting tax documents
6. W2 for applicant and spouse
7. Six recent pay stubs for and working income
8. Life insurance policies owned by applicant or spouse - copy of all policies and cash surrender value statements
9. Funeral/burial contracts/accounts
10. Birth Certificate of applicant and spouse
11. 4506T- IRS transcript request if you don't have two years of tax returns available
12. Copies of all estate planning documents including Health Care Proxies, Powers of Attorney, Wills for both applicant and spouse
13. Mortgage statement showing current outstanding balance
14. Four most recent property tax bills
15. Six months of current utility bills (gas/water/electric)
16. House insurance bill showing total current annual premium
17. Health and dental insurance bills and cards (Medicare, Medex, etc) for both applicant and spouse.
18. 36 months of bank statements for all accounts (individual accounts and jointly owned accounts) and three years' worth of statements for any accounts closed in the past five years
19. social security benefit statements (most recent letter received in January} for applicant and spouse
20. P & L for businesses and any investment properties
21. Marriage certificate (if available)
22. Copies of any trusts that currently hold assets or that were opened or closed in the past five years
23. Copies of any trusts where applicant or spouse is currently serving as trustee
24. Proof of all pension income received by applicant or spouse
25. Three years of statements for all investment accounts and retirement accounts
26. Title and registration to all automobiles