



## SOONERCARE DOCUMENT VERIFICATION GUIDE

### How to use this guide:

- First, in the left column, find the verification request that matches the request on your member portal or letter. Read the brief description to understand the request.
- Second, in the middle column, view what ideal documents can be turned in for the verification request. **Only one document is needed unless otherwise stated.**
- Some verification requests may require that you call the SoonerCare helpline.
- Please provide the documents by the date in the notice you received from SoonerCare. Do not send originals, they will not be returned.

Any document turned in may be marked as “document not accepted” if it is not readable, password protected, cannot be used to update the requested verification, or is not related to the verification request, etc. If this happens, you will need to upload a new document for your eligibility to be reviewed.

Some income types do not count towards determining your eligibility. Examples include child support, food stamps, VA disability, foster care/adoption payments, TANF payments, workers’ compensation, etc. If these income types are listed on your case and you have received an income verification for unearned income, contact the SoonerCare helpline at 800-987-7767 for assistance.

To view the **SoonerCare and Insure Oklahoma Income Guidelines**, [click here](#).

To view how we determine income using Modified Adjusted Gross Income, [click here](#).

<b>Verification/Proof Request -</b> <i>What does it mean?</i>	<b>Ideal list of documents to send in.</b>  <b>Only one document is needed unless otherwise stated.</b>	<b>Other proof you can send a copy of.</b>
<b>ALIEN AND U.S. CITIZENSHIP VERIFICATIONS</b>		
<b>Alien - The Alien/Lawful Permanent Resident status needs to be verified through the Systematic Alien Verification for Entitlement (SAVE) system.</b>	<ul style="list-style-type: none"> <li>• Form I-94/1-94A – arrival/departure record.</li> <li>• Form I-571 – refugee travel document.</li> <li>• Form I-551 – permanent resident card (green card).</li> </ul>	Other valid Immigration records issued by USCIS.
<b>COFA (Compact of Free Association) Migrant - Republic of the Marshall Islands, The Federated States of Micronesia or the Republic of Palau. Your COFA migrant status needs to be verified.</b>	<ul style="list-style-type: none"> <li>• Form I-94/1-94A – arrival/departure record.</li> <li>• Passport from Republic of the Marshall Islands, The Federated States of Micronesia or the Republic of Palau.</li> </ul>	

<p><b>Identity</b> - <i>Your identity needs to be verified.</i></p>	<ul style="list-style-type: none"> <li>• Driver's license or state-issued ID.</li> <li>• Certificate of Indian blood or other tribal document.</li> <li>• Passport.</li> </ul>	<p><a href="#">See full identity proof list.</a></p>
<p><b>U.S. Citizenship</b> - <i>The citizenship needs to be verified.</i></p>	<ul style="list-style-type: none"> <li>• U.S. birth certificate.</li> <li>• U.S. passport.</li> <li>• Naturalization certificate issued by USCIS.</li> <li>• Certificate of birth abroad.</li> </ul>	<p><a href="#">See full citizenship proof list.</a></p>
<p><b>EARNED INCOME VERIFICATIONS</b></p>		
<p><b>Income</b> – <i>All earned income from a job and/or self-employment must be verified. OHCA requires proof of income or no income for anyone in the household age 15 and older. Paystubs and/or employer letters must show the employee name, company name (if applicable), pay dates and/or pay periods, all gross income and pre-tax deductions including any bonus, overtime or commission checks. <a href="#">View more information.</a></i></p>		
<p><b>Income</b> - <i>Income for the member requested needs to be verified.</i></p>	<ul style="list-style-type: none"> <li>• Last 30 days of current consecutive paystubs.</li> <li>• <a href="#">Income verification form.</a></li> </ul>	<ul style="list-style-type: none"> <li>• A letter from the employer or company official.</li> </ul>
<p><b>Income (Employment and UIB)</b> – <i>Both a job and unemployment income are on the case, and both need to be verified.</i></p>	<ul style="list-style-type: none"> <li>• Last 30 days of current consecutive paystubs.</li> <li>• <a href="#">Income Verification form.</a></li> <li>• <b>AND</b> Unemployment benefit letter.</li> </ul>	<ul style="list-style-type: none"> <li>• A letter from the employer or company official.</li> </ul>
<p><b>Update Income Info-</b> <i>A member aged 15 and older needs to verify if they have income or no income. "No income" means you have no employment income <b>AND</b> no other sources of income.</i></p>	<p>Go to <a href="http://MySoonerCare.org">MySoonerCare.org</a> and log into your member portal to self-attest to having no income.</p> <p>If you do have income, update the employment and/or other income sections of the member application.</p>	<ul style="list-style-type: none"> <li>• <a href="#">No income form.</a></li> <li>• Written statement of no income.</li> </ul>
<p><b>Provide Household Income</b> - <i>Income for all members aged 15 and older needs to be verified (this includes attesting to no income for anyone over 15 who has no income).</i></p>	<ul style="list-style-type: none"> <li>• Last 30 days of current consecutive paystubs.</li> <li>• <a href="#">Income verification form.</a></li> <li>• Employer letter.</li> <li>• <a href="#">No income form.</a></li> </ul>	<p>Go to <a href="http://MySoonerCare.org">MySoonerCare.org</a> and log into your member portal to self-attest any member(s) who have no income.</p>

<p><b>Self-Employment Income</b> - <i>The member(s) who are listed as being self-employed must verify their current self-employed income. This includes farming, S-corps, LLCs and partnerships.</i></p> <p><b>Please note:</b> <i>If the income listed on the taxes is not the same income as what is listed on the case, the taxes cannot be used as proof of the self-employed income.</i></p>	<ul style="list-style-type: none"> <li>• <a href="#">Self-employment cash income statement.</a></li> <li>• Current profit and loss statement</li> <li>• Tax form 1040 including Schedule 1, Schedule C, Schedule E and Schedule F.</li> <li>• 1065 Schedule K1 with Schedule E (if you have an S-Corp or LLC).</li> <li>• <b>AND</b> last 30 days of current consecutive paystubs if you pay yourself W-2 wages.</li> </ul>	<p>Contact the SoonerCare helpline at 800-987-7767.</p>
<p><b>Cash Income</b> - <i>When you are paid in cash and may not get a paystub and may not have filed taxes.</i></p>	<ul style="list-style-type: none"> <li>• <a href="#">Income verification form</a> (1099 contactor or paid in cash section).</li> <li>• <a href="#">Self-employment cash income statement.</a></li> </ul>	
<p><b>Verify Employment Income</b> - <i>The employer's name listed on the case is not matching with our records.</i></p>	<ul style="list-style-type: none"> <li>• Last 30 days of current consecutive paystubs.</li> <li>• <a href="#">Income verification form.</a></li> </ul>	<ul style="list-style-type: none"> <li>• A letter from the employer or company official.</li> </ul>
<b>UNEARNED INCOME VERIFICATIONS</b>		
<p><b>Unearned Income</b> - <i>This income type comes from various sources that are not earned from a job. This is not an all-inclusive list. All unearned income must be verified with proof documents showing the name of the member receiving the income.</i></p>		
<p><b>Unearned Income - Commercial Disability</b></p>	<p>Current statement showing amount paid by the employer.</p>	
<p><b>Unearned Income - IRA, 401k withdrawals or annuities</b></p>	<p>Current investment account statement showing the amount withdrawn.</p>	
<p><b>Unearned Income - Non-Recurring Lump Sum</b> <i>Provide proof of the federal taxable income received this month as a one-time payment.</i></p>	<ul style="list-style-type: none"> <li>• Award letter.</li> <li>• Check stub.</li> <li>• Statement letter from source of lump sum.</li> </ul>	
<p><b>Unearned Income - Ordinary or Qualified Dividends</b></p>	<p>Statements from the company with how much income you are receiving from the dividends.</p>	<p>1099-DIV.</p>
<p><b>Unearned Income - Other Income</b></p>	<p>Documents clearly showing what the other taxable income is and how often it is received.</p>	

<b>Unearned Income - Private Pension and Annuities</b>	A statement from the company or financial institution showing the pension earnings and how often received.	
<b>Unearned Income - Retirement</b>	A statement from the company or financial institution showing the retirement earnings and how often received.	
<b>Unearned Income - Royalty Income</b>	A statement from the company or financial institution showing the royalty earnings and how often received.	
<b>Unearned Income - Rental Income</b>	<ul style="list-style-type: none"> <li>• A profit and loss statement.</li> <li>• <a href="#">Self-employment cash income statement.</a></li> <li>• Current taxes - first page of 1040 <b>AND</b> all of the following: Schedule C, Schedule E and Schedule 1.</li> </ul>	
<b>Unearned Income - Tribal Gaming Income</b>	<ul style="list-style-type: none"> <li>• A statement from the company or financial institution.</li> <li>• 1099-G misc. tax forms.</li> </ul>	
<b>Unearned Income -Trust</b>	<ul style="list-style-type: none"> <li>• Trust document.</li> <li>• Settlement agreement.</li> </ul>	<ul style="list-style-type: none"> <li>• Letter from attorney.</li> </ul>
<b>EXPENSE VERIFICATIONS</b>		
<p><b>Expenses</b> - <i>The federal deductible expenses listed on your case need to be verified. These can only be the items on tax form 1040 Schedule 1: Adjustments to Income. These can only be claimed on the application as an expense if you have paid the expense during the time you are applying for SoonerCare. If you paid the expense prior to applying for SoonerCare, the expense cannot be applied to your case. The expenses listed below are not all inclusive. Call the SoonerCare helpline if you have questions. <a href="#">View more information.</a> .</i></p>		
<b>Expenses - Deductible Part of Self-Employment Tax</b>	<ul style="list-style-type: none"> <li>• Tax form 1040, Schedule 1 <b>and</b> Schedule C.</li> </ul>	
<b>Expenses - Self-Employed Health Insurance Deduction</b>	<ul style="list-style-type: none"> <li>• Current bill or statement showing the amount being paid for health insurance.</li> </ul>	

<p><b>Expenses - Business Expenses on Tax Form 2106</b> <i>(this can only be claimed for Armed Forces reservists, government officials who are paid on a fee basis, and performing artists) This is not the same as a self-employed business expense.</i></p>	<ul style="list-style-type: none"> <li>• Tax form 1040, Schedule 1 <b>and</b> tax form 2106.</li> </ul>	
<b>RESIDENCY VERIFICATIONS</b>		
<p><b>Residency, Paris Report</b> - A match was found that there may be open medical benefits in another state for this member under the Social Security number provided. It needs to be verified that those medical benefits are closed.</p>	<p><b>1st request:</b></p> <ul style="list-style-type: none"> <li>• Current utility bill with name and current address.</li> <li>• Rental agreement showing all current household members.</li> <li>• Daycare, school or college enrollment records.</li> <li>• Medicaid closure letter from other state.</li> </ul> <p><b>2nd request:</b></p> <ul style="list-style-type: none"> <li>• Medicaid closure letter from the other state.</li> </ul>	<ul style="list-style-type: none"> <li>• Letter from shelter.</li> <li>• Letter from landlord with current address and declaring all current household members.</li> <li>• Contact the SoonerCare helpline at 800-987-7767.</li> </ul>
<p><b>Verify Household</b> - The household member who has an out-of-state Medicaid match will close for a Paris request (see above). All other members need to be verified that they are currently living in the home.</p>	<p>Contact the SoonerCare helpline at 800-987-7767 to verify who is currently living in the home.</p>	
<p><b>Residency</b> - Oklahoma residency needs to be verified as requested by member Investigations.</p>	<ul style="list-style-type: none"> <li>• Current utility bill with name and current address.</li> <li>• Rental agreement showing all current household members.</li> <li>• Daycare, school or college enrollment records.</li> </ul>	<p>Contact Member Investigations at 405-522-5508 or 1-855-817-3728.</p>
<p><b>Returned Mail, Residency</b> - Alert on the case showing the address on file is resulting in returned mail.</p>	<p>Contact the SoonerCare helpline at 800-987-7767 to self-attest the correct address.</p>	<ul style="list-style-type: none"> <li>• Current utility bill with name and current address.</li> <li>• Rental agreement showing all current household members.</li> <li>• Daycare, school or college enrollment records.</li> </ul>
<p><b>Unable to Locate</b> - The address on the case is resulting in returned mail. Verification of your current mailing address is needed.</p>	<ul style="list-style-type: none"> <li>• Verify the address is correct on your member portal and resubmit your case.</li> <li>• Contact the SoonerCare helpline at 800-987-7767 to update the case over the phone.</li> </ul>	<ul style="list-style-type: none"> <li>• Current utility bill with name and current address.</li> <li>• Rental agreement showing all current household members.</li> </ul>

OTHER VERIFICATION TYPES		
<b>Household Circumstances</b> - We need to verify who is living in your home.	Contact the SoonerCare helpline at 800-987-7767.	
<b>Indication of Death (from SSA)</b> - An update was received that someone on the case has passed away.	Death certificate.	Contact the SoonerCare helpline at 800-987-7767.
<b>Suspension Indicator of Death</b> - Case is suspended because of suspicion that someone has passed away.	<ul style="list-style-type: none"> <li>• Death certificate.</li> <li>• Member statements.</li> <li>• Third-party statements the person is either alive or has passed.</li> </ul>	Contact the SoonerCare helpline at 800-987-7767.
<b>Other</b> - Something specific is being requested.	<ul style="list-style-type: none"> <li>• Refer to the instructions in the letter that was received.</li> </ul>	Contact the SoonerCare helpline at 800-987-7767.
<b>Other Insurance Coverage/STBS TPL</b> - The other insurance listed on your case needs to be verified.	Document showing that the other private insurance is no longer active.	Contact the SoonerCare helpline at 800-987-7767.
<b>Pregnancy</b> - Proof of current pregnancy or miscarriage is needed.	Official statement from doctor, clinic or hospital showing the estimated due date or the miscarriage date. (Ultrasound photos and lab results are not accepted.)	
<b>Newborn's Father Information</b> - The father of the newborn needs to be added to the case and verified.	Add the newborn father to your case if he is living in the household and then contact the SoonerCare helpline at 800-987-7767 for next steps.	
<b>SSN</b> - Verification or proof of your social security number is being requested.	Go to <a href="https://www.mysoonercare.org">MySoonerCare.org</a> and log into your member portal to update the Social Security number for the requested member.	Social Security card.
<b>TMA 1, 2, 3</b> - Verification of several items on the case are needed to determine eligibility for the Transitional Medical Assistance program.	<a href="#">The TMA reporting form.</a>	Contact the SoonerCare helpline at 800-987-7767 to self-attest to the items and information needed.

<b>Verify Household, Custody -</b> <i>Members of your household are listed as being in custody and this needs to be verified.</i>	Contact the SoonerCare helpline at 800-987-7767.	
<b>Verify Household, TANF -</b> <i>Members of your household are listed as being on a TANF case and this needs to be verified.</i>	Contact the SoonerCare helpline at 800-987-7767.	
<b>INSURE OKLAHOMA (IO) VERIFICATIONS</b>		
<b>Class Schedule &amp; FAFSA, IO only</b> <i>– Accredited college enrollment needs to be verified.</i>	Current class schedule <b>AND</b> signed FAFSA application.	
<b>Last 2 paystubs, IO only -</b> <i>Income needs to be verified.</i>	<ul style="list-style-type: none"> <li>Last 30 days of current consecutive.</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Income verification form.</a></li> <li>An employer letter.</li> </ul>
<b>Self Employment Income</b> <i>The member(s) who are listed as being self-employed must verify their current self-employed income.</i>	<ul style="list-style-type: none"> <li><a href="#">Self-employment cash income statement.</a></li> <li>Current profit and loss statement.</li> <li><b>AND</b> last 30 days of current consecutive paystubs if you pay yourself wages.</li> </ul> <p>Business owners applying for subsidy assistance <b>MUST</b> provide most recent year's federal tax return.</p>	Most recent year's tax return.
<b>IO Monitoring, IO only – Case</b> <i>was suspended for review.</i>	Contact the Insure Oklahoma helpline at 888-365-3742.	
<b>Monetary Determination, IO only – Income from unemployment needs to be verified.</b>	Unemployment benefit statement.	

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**ADDRESS**

4345 N. Lincoln Blvd.  
Oklahoma City, OK 73105



**WEBSITES**

oklahoma.gov/OHCA  
mysoonerCare.org



**PHONE**

Admin: 405-522-7300  
Helpline: 800-987-7767