

# Be Your Own Detective: How to Get Documentation

Applying for benefits requires detailed documentation of the applicant's personal and financial information. Tracking down the right documents can require detective work, especially if you are searching for documents on behalf of someone else. Here are some guidelines to help you be successful and efficient.

## Birth Certificate, Death Certificate, or Marriage Certificate

Contact the vital records office in the state or county where the birth, death, or marriage occurred. You may have to fill out an application and pay a small fee. Sometimes this can be done online (it varies by county and state). Requests must be made by the person named on the certificate or their parent, guardian, child, or spouse.

## Car Title

Visit the county clerk's office for the county in which the vehicle is registered. Take two forms of photo ID and the vehicle registration document and insurance card. If the title is lost, apply for a replacement title. It will be mailed to you. There is a small fee.

## Certified copy of discharge paper - for VA only

A DD214 (or similar discharge record) can be requested from the National Personnel Records Center online or via mail or fax. Call your local VA office or visit <https://www.archives.gov/veterans/military-service-records/> for complete instructions. Be prepared to answer: branch of the military, the dates of service, and location of induction. But if you do not have this information, don't panic. You may be able to proceed without it. If you already have the original discharge document and need to get it certified, take it to your local VA office. They will make a copy and stamp it certified. Always protect your original.

## Financial or Insurance Statements (bank account, pension, annuity, IRA, CD, investment, insurance premium)

Contact the bank or company and ask for documentation to prove what needs to be verified. You will need the name of the account holder, date of birth and social security number, mailing address associated with the account, and the account or policy number.

- *If you are not the person who purchased the product or an authorized user on the account, you may need to fax the company authorization by the account owner to allow access (for instance, a Durable Power of Attorney naming you as the agent). If the account owner can speak to the company representative, he or she can authorize access over the phone, which is much faster. Just get together and place the call. Have the owner verify information and give permission to speak with you. Then ask your questions.*

- If the company from which the product was originally purchased no longer exists, investigate online to determine which company bought the original company. For example, search “ACME Insurance Company bought by what company?” or “Who owns ACME Insurance Company?” If you have a bank statement showing deposits by a company but lack full name or contact information, you may ask your bank to assist you in tracing the information from the review of the bank statement.
- If your health insurance premium is automatically deducted from your Social Security, you might never have received a health insurance premium statement. You can obtain a statement by contacting the insurance provider directly. If the premium amount is \$0, ask them to send you a letter confirming this amount. TennCare requires this documentation.

### Property Tax Statements

Visit the register of deeds or tax assessor’s office for the county where the property is located. You can find property tax information via the Tennessee Comptroller of the Treasury website, [www.assessment.cot.tn.gov/RE Assessment/](http://www.assessment.cot.tn.gov/RE_Assessment/) or from the Tennessee County Trustees Association website, <http://tennesseetrustee.com/>. Knox County residents may go to [www.knoxcounty.org/apps/tax search/](http://www.knoxcounty.org/apps/tax_search/).

### Utility Statements and Phone Bills

Contact the utility or phone company directly. If you have an online account and login information, this may be the fastest way to retrieve statements. Save all paper copies of statements and bills that arrive while we are working with you – don’t throw anything away! TennCare may request these documents.

### Social Security Award Letter(s)

Call 1-800-772-1213 or visit <https://secure.ssa.gov/RIL/SiView.do> to set up an account with SSA. You will be asked several security questions related to your financial history. Take care to answer these correctly; if you fail to do so, you will be denied access. You may also visit your local SSA office. Take two forms of photo ID with you. If this is not practical, ask us if we think we can verify the Social Security through TennCare’s database.