

EDGENTUS WEBINAR SERIES

COURSE SUMMARY

Anatomy of a Medicaid Planning Case: Complex Case with a Fair Hearing

This 3-hour course goes in-depth on the Medicaid Planning process for a single patient in a nursing home. The entire process from inquiry to completion is discussed in great detail. Included in this case study is an actual fair hearing and final judgment in favor the applicant. This course is applicable for practitioners in all states except California.

Learning Objectives:

Through this course you will learn:

- Client intake and retention for a single nursing home patient with \$500,000 in assets.
- Case fact analysis and planning recommendations.
- Medicaid asset preservation planning alternatives within a single case.
- Executing the Medicaid eligibility plan step by step.
- Preparing and filing the Medicaid application.
- Dealing with an improper process denial.
- Requesting a fair hearing to overcome an improper denial.
- Winning the fair hearing, including a full breakdown of the administrative law judge's opinion.

Location: Online Webinar (Zoom Webinar Platform)

Hours: 3

Date: September 17, 2020

Time: 2:00 pm ET – 5:00 pm ET

Presenters: Michael Anthony, JD

Level: Advanced

Prerequisites: None. (Introduction to Medicaid Planning and Anatomy of a Medicaid Planning Case: Single Applicant are strongly recommended.)

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COURSE OUTLINE

Anatomy of a Medicaid Case: Complex Case with Fair Hearing

Date: September 17, 2020

Time: 2:00 pm ET – 5:00 pm ET

- I. Medicaid Planning Case Overview
 - a. Fact pattern of 79-year-old male in Texas nursing home
 - b. Approximately net worth of \$500,000
 - c. Cost of Care \$6,500/month
 - d. Previous gift to irrevocable trust 3 years prior
 - e. Income over the income limit
- II. Client Intake
 - a. Completing the intake form
 - b. Reviewing the intake form
 - c. Following up with secondary information
- III. Creating the Medicaid eligibility plan
 - a. Reviewing the alternatives
 - b. Deciding on a course of action
 - c. Putting together the plan
- IV. Executing the Medicaid eligibility plan
 - a. IRA Rollover to Tax Deferred Annuity
 - b. Half-a-loaf plan to cover gifted assets to trust
 - i. Partial cure from irrevocable trust
 - ii. Purchase of short-term Medicaid Compliant Annuity
 - c. Creation and funding of the Qualified Income/Miller Trust
- V. Preparing and Filing the Medicaid Application
 - a. Filling out the Medicaid application
 - b. Filing the Medicaid application
 - c. Providing the requested documentation
 - d. Requesting additional time to provide documentation

(continued on the next page)

VI. Handling a wrongful denial

- a. Attempt to reason with the caseworker and the caseworker's supervisor
- b. Requesting a fair hearing
- c. Representing the applicant at fair hearing
- d. Advocacy during the hearing/winning the fair hearing
- e. Review of the actual fair hearing opinion