EDGENTUS WEB SERIES

COURSE SUMMARY

Course Title: Introduction to Medi-Cal Planning
This 2-hour introductory course explains the basics of the Medi-Cal long-term care system, its historical roots and how Medi-Cal Planning is used in practice to help protect clients from overspending on the cost of long-term care. This course is applicable for practitioners in all states except California.

Learning Objectives:
Through this course you will learn:

- The federal Medicaid program covers long-term care expenses.
- How California participate in the federal Medicaid program with Medi-Cal.
- The basic eligibility rules for long-term care Medi-Cal.
- How asset restructuring can achieve eligibility for long-term care Medi-Cal.
- The methodology used to analyze a client’s situation to determine if Medi-Cal Planning is right for them.
- The proper data to collect from a client to determine the potential for long-term care Medi-Cal eligibility.
- The Medi-Cal Planning timeline from client inquiry to post-eligibility planning.

Location: Online Webinar (Zoom Webinar Platform)

Hours: 2

Date: September 16, 2020

Time: 10:00 am PT – 12:00 pm PT

Presenters: Michael Anthony, JD

Level: Introductory/Basic

Prerequisites: None

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COURSE OUTLINE

Date: Sept. 16, 2020 Time: 10:00 am PT – 12:00 pm PT

I. What is Medi-Cal?
   a. History of federal Medicaid Program
   b. California Participation in Medicaid
   c. General Medi-Cal v. LTC Medi-Cal
   d. LTC Medi-Cal Eligibility Rules
   e. The Creation of the Medi-Cal Spenddown
   f. Source of Medi-Cal rules
      i. Federal Statutes and Regulations
      ii. State Statutes and Regulations
      iii. State Eligibility Manuals

II. What is Medi-Cal Planning?
   a. Definition of Medi-Cal resources
      i. Countable v. Non-Countable Assets
   b. Asset restructuring to achieve eligibility
   c. Med-Cal income limits
   d. Medi-Cal Planning methodology
   e. Client intake and data collection
   f. Medi-Cal Planning timeline
      i. Client Inquiry
      ii. Initial Data Collection
      iii. Preliminary Assessment
      iv. Client Retention
      v. Creating a Medi-Cal Eligibility Plan
      vi. Implementing the Medi-Cal Eligibility Plan
      vii. Applying for Medi-Cal
      viii. Verification Process
      ix. Advocacy and Fair Hearing
      x. Approval
      xi. Post-Eligibility Issues