

EDGENTUS WEBINAR SERIES

COURSE SUMMARY

Anatomy of a Medi-Cal Planning Case: Complex Case with a Fair Hearing

This 3-hour course goes in-depth on the Medi-Cal 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.

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.
- Medi-Cal asset preservation planning alternatives within a single case.
- Executing the Medi-Cal eligibility plan step by step.
- Preparing and filing the Medi-Cal 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: August 25, 2020

Time: 2:00 pm PT – 5:00 pm PT

Presenters: Michael Anthony, JD

Level: Advanced

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

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COURSE OUTLINE

Anatomy of a Medi-Cal Planning Case

Date: August 25, 2020 Time: 2:00 pm PT – 5:00 pm PT

- I. Medi-Cal Planning Case Overview
 - a. Fact pattern of 79-year-old male in California nursing home
 - b. Approximately net worth of \$500,000
 - c. Cost of Care \$6,500/month
 - d. Previous gift to irrevocable trust 1 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 Medi-Cal eligibility plan
 - a. Reviewing the alternatives
 - b. Deciding on a course of action
 - c. Putting together the plan
- IV. Executing the Medi-Cal eligibility plan
 - a. Transfers
 - b. Annuity Options
- V. Preparing and Filing the Medi-Cal Application
 - a. Filling out the Medi-Cal application
 - b. Filing the Medi-Cal application
 - c. Providing the requested documentation
 - d. Requesting additional time to provide documentation

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- 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