

Know Your Rights: NYLAG Webinars on Medicare and Medicaid -

The Evelyn Frank Legal Resources Program conducted a five-part Continuing Legal Education Webinar program in April and May 2016 that provides tools to understand and navigate the complex world of Medicare and Medicaid in New York. The focus is on eligibility and application procedures for older persons and people with disabilities who need help paying the out-of-pocket costs for Medicare, and cannot afford services not covered by Medicare such as home care. This series does **not include** Medicaid eligibility for nursing home care or managed long term care in depth.

Links to view the completed webinars and to download the materials FREE are posted in the table below.

CLE: We are unable to offer CLE credit for those viewing the recorded webinars.

TOPICS
<p>Jan. 18, 2023 Webinar on Medicaid Eligibility Changes and "Unwinding" of Public Health Emergency --</p> <ol style="list-style-type: none">1. View the <u>recorded webinar here</u> (no CLE credit for viewing recording)2. <u>PowerPoint from Jan. 18, 2023 webinar</u>3. <u>Appendix of references, forms, and case examples from webinar</u> (with updated HRA Chart of Medicaid levels updated Jan. 24, 2023 and updated MAP-3190 form (1-10-23) to request rebudgeting)4. <u>Excel Template to estimate Medicaid eligibility and spenddown</u> (using 2023 FPLs) <p>2022 WEBINARS on Medicaid Eligibility and 2023 Changes</p> <ul style="list-style-type: none">• Live webinars in the <u>Chat with the Expert series</u>, sponsored by the NYC Department for the Aging, hosted by NYLAG attorneys:<ul style="list-style-type: none">◆ November 1: <u>Pooled Trusts - a Pathway to Medicaid Eligibility</u>, with NYLAG's Tea Bishop◆ November 16: <u>Introduction to Medicaid Home Care Services and Managed Long-Term Care (MLTC)</u>, with NYLAG's Peter Travitsky• VIEW <u>recorded webinars in the Chat with the Expert series</u> presented by NYLAG Evelyn Frank attorneys on Medicaid eligibility and upcoming changes.<ul style="list-style-type: none">◆ <u>Medicaid Eligibility Part 1: Age 65+ and People with Disabilities</u> (September 29, 2022) with NYLAG's Valerie Bogart and Anna Arellano--Includes a preview of the increases in the Medicaid income and

asset limits coming in 2023

- ◆ Medicaid Part 2: Myths and Facts - Liens, Lookback, IRAs, and More (October 19, 2022) with NYLAG's Rebecca Wallach and Anna Arellano

LUMP SUMS -- Using SNTs to Protect Medicaid and Other Strategies when Receiving A Lump Sum - View recordings of Parts 1 and 2 Nov. 2019

Part 1

â ¢ Basics - What is a Supplemental Needs Trust; types of SNTs (pooled trusts vs. individual trusts, 3rd party trusts vs. self-settled trusts)

â ¢ Using SNTs to eliminate the Medicaid Spend-down - Basics of Pooled Income Trusts (NOT a detailed explanation of all of the steps to get trust approved by Medicaid - for more on that see this Step by Step guide)

â ¢ What expenses may be paid by an SNT? Different rules for Medicaid, SSI, and other benefits

â ¢ ABLE accounts - how are they different than SNTs?

Part 2 -- Options when you receive a Lump Sum vary with different benefits. Learn rules on impact of "transferring" the lump sum, spending it or depositing it into an SNT for:

â ¢ MEDICAID - differences between "MAGI" and "Non-MAGI" Medicaid

â ¢ SSI

â ¢ Veteran's Benefits (new penalties on transfers of assets since 10/2018)

â ¢ SNAP/Food Stamps

â ¢ Housing Subsidies (Section 8)

Lookback and Home Care Changes Enacted in 2020 Budget

NYLAG Evelyn Frank program conducted a webinar on September 9, 2020. Please note that the webinar says the lookback will start Jan. 1, 2021. **That has since changed to April 1, 2024.**

- Link to recording of webinar conducted 9/9/20 by NYLAG Evelyn Frank Program director Valerie Bogart about the budget cuts (but note lookback

will not start until **April 1, 2024**)

- **Download the PowerPoint** from the Sept. 9, 2020 webinar here (but note lookback will not start **until April 1, 2024**)

Fact Sheets and Webinars on Managed Long Term Care and FIDA

- Click [here for information](#) by NYLAG and other organizations (not part of Borchard series)

Medicare Basics - Navigating Costs for Low-Income Beneficiaries

- Click [here to view the recorded webinar](#). (No CLE credit available for viewing the recorded webinar).
- Download the [PowerPoint presentation](#) here.
- Recorded April 13, 2016

Medicaid Overview - different categories of recipients

- Which "Bucket" or Category is client in - MAGI or Non-MAGI? Who has a choice of category and "mixed" households
- Who is/is not covered by the Affordable Care Act?
- Immigration & Residency Criteria

- Click here to [view the webinar](#)
- [Click here to download the Powerpoint presentation](#)
- Recorded April 27, 2016

How Client Accesses Medicaid Services - [Click here to register](#)

- Learn the different types of Managed Care plans and what services they provide
- Differences for people with and without Medicare- transitions for new Medicare beneficiaries
- Differences for people seeking Medicaid home care services

Download [PowerPoint presentation here](#)

[View Webinar here](#) Recorded April 27, 2016

Focus on Disabled/Age 65+/ Blind ["DAB"] Medicaid- Part 1 - financial eligibility

- Income & Resource Rules for this "non-MAGI" category
- How Income is Budgeted -Singles vs. Couples, Spousal Refusal & Spousal Impoverishment
- Basics of Medicaid "Spend-down" and tips for reducing it
- Special rules for working people with disabilities < 65

[Click here to view the webinar](#) Recorded May 6, 2016

[Download the Powerpoint](#) here.

Download the [DAB Household Size calculator chart](#) here.

Focus on Disabled/Age 65+/ Blind ["DAB"] Medicaid- Part 2: Applications and procedures

[Click here to view the webinar - How and Where to Apply for Medicaid](#)

- Tips for Requesting "Retroactive" eligibility to cover bills in 3 months preceding application
- Tips for people how people seeking Managed Long Term Care apply for Medicaid

Download the [Powerpoint](#) here and the [Sample Medicaid application](#) here

Recorded May 6, 2016

Medicare and Medicaid for People Age 65, Blind or Disabled and Access to Long Term Care) Services in the Community

[Click here to view the webinar](#)

- Brief 1-hour overview
- Recorded July 6, 2016

[Pooled Trusts and Medicaid in NYS](#)

- Conducted by David Silva, former Asst. Director, Evelyn Frank Legal Resources Program
- Recorded July 16, 2013 (not part of the Borchard series)
- Download info on pooled trusts [here](#)

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