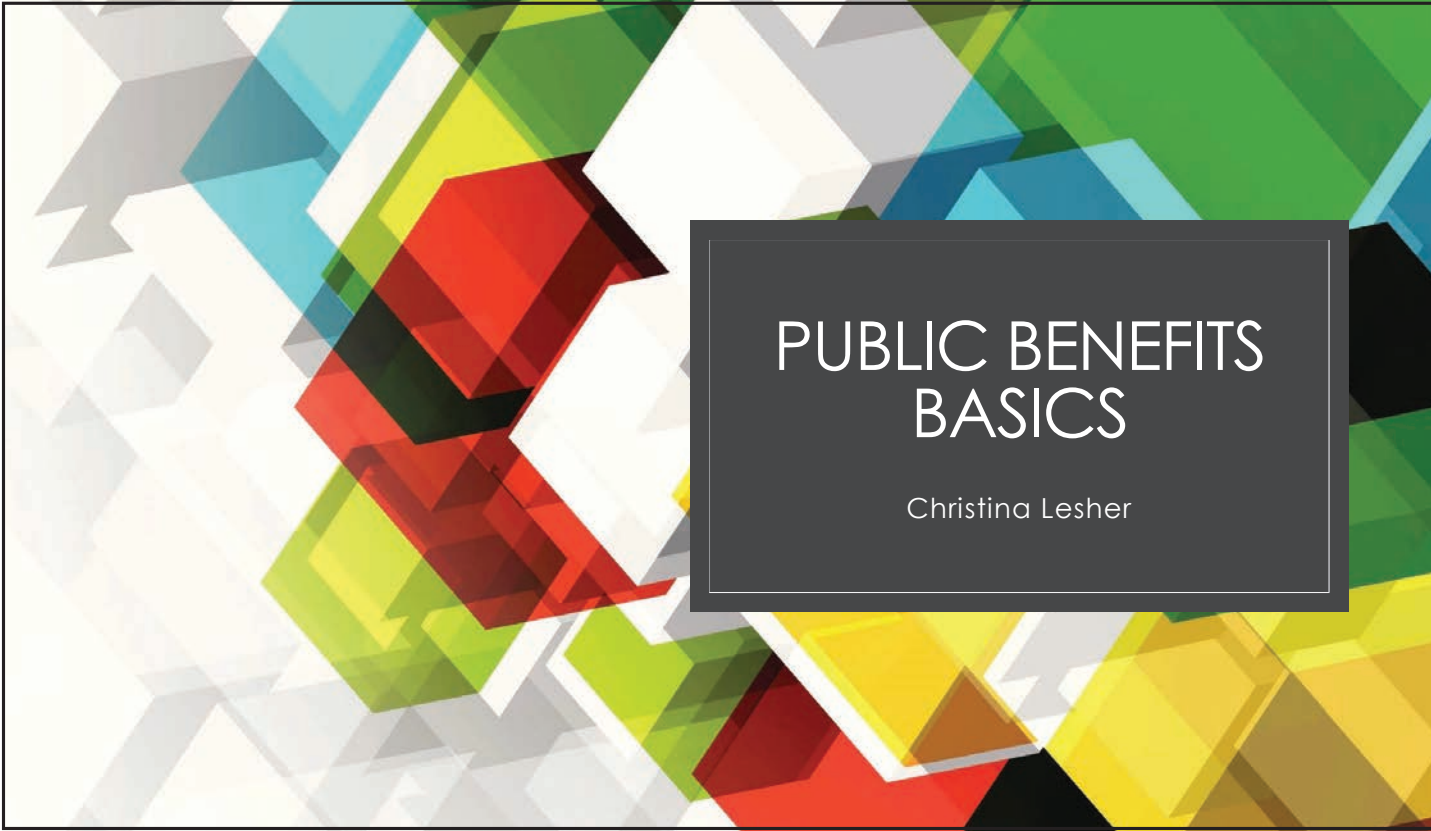




# PUBLIC BENEFITS BASICS

Christina Lesher

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## The Recipe of Public Benefits

- Income
- Asset- countable/exempt
- Disability/Medical requirement
- Interest List

2

## Using Public Benefits for care from home to facility

- Many Medicaid home care programs for children and adults have wait lists
- Client cooperation
- Add clients to interest lists now
  - Star+Plus Waiver- Harris County 713-692-1635
  - Star-Plus in Other Counties - <https://www.dads.state.tx.us/contact/search.cfm>.  
This link takes you to a search engine where you will search for the local Star-Plus contact number by zip code or city.
  - Information needed: SS#, DOB, telephone and address.

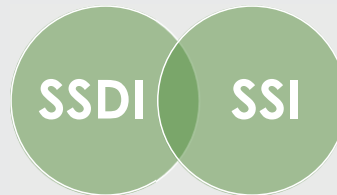
## Using Public Benefits for care From Home to Facility

- Review estate planning documents
  - Testamentary SNTs for spouses, check bene designations.
- Create scenarios for how to pay for care
  - Home
  - Assisted Living
  - Nursing home

## SSDI & SSI

### Social Security Disability Insurance (SSDI)

- Monthly cash benefit
- Medicare
- Not Means Tested



### Supplemental Security Income (SSI)

- Monthly cash benefit
- Medicaid
- Means Tested

Can be eligible for both

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## SSI Eligibility Requirements

**Categorical:** Disability, 65+, Blindness

**Alienage:** Ineligible except certain groups such as:

- Citizens & aliens entering before 8/22/96
- Asylees and refugees
- Veteran or on active duty in the armed services

**Income Limits:**

- \$783/mo. individual, \$1,175/mo. couple; first \$20 exempt

**Resources Limits:**

- \$2,000 individual, \$3,000 couple; residence & other exemptions
- Who receives? No/ little work history

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Title search: Public Benefits Basics

Also available as part of the eCourse

[Special Needs Trusts Basics and Best Practices](#)

First appeared as part of the conference materials for the  
16<sup>th</sup> Annual Changes and Trends Affecting Special Needs Trusts session  
"Maximizing Public Benefits (Basics)"