

# Medicaid in Depth – the Battle to Preserve Benefits In the Trenches

The University of Texas School of Law  
20th Annual Changes and Trends Affecting Special Needs Trusts

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## Who are we? And how did we get here?:

Christina Leshner: Elder, Estate Planning, & Special Needs Attorney

Laurie Mann: Truth-in-Taxation Specialist

Allison Schaberg: Special Needs Financial Planner

Haley Greer: Director of The Arc of Texas Master Pooled Trust

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## James:

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13 years old

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VACTERL

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100% G tube feeding, esophageal atresia

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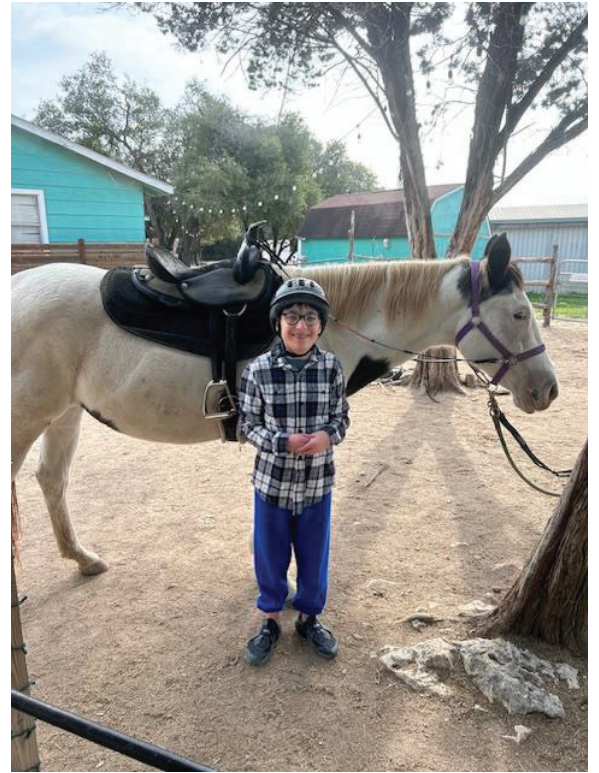
Congenital heart issues, 80% O2

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Loves Marvel and Lego

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MDCP



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**The supreme art of war is to subdue the enemy without fighting.**

SUN TZU

## Prepping for Annual Renewal:

- Goal: no reduction in benefits
- Ask for prior year assessment (STAR Kids Screening and Assessment Instrument)
- Fill out before assessment with current status
- Review questions with any another caregiver(s):
  - Other caregivers may see things differently
  - Brainstorming/mitigate disagreements

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## “Snapshots in Time”

- Coordinate doctor appt. 7 days before assessment date
- New doctor orders, weight and height
- Have therapy dates locked in w/in the last 7 days for OT, PT, and ST
- Coordinate as many therapy hours as allowed b/c part of assessment includes therapy hours

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## Document, Document, Document!

- Keep a calendar:
  - ER
  - Hospital visits
  - Doctor visits
  - Medicine/food changes
- Nurses' notes from private agencies
- Pediatrician one pager

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Title search: Medicaid in Depth - the Battle to Preserve Benefits

Also available as part of the eCourse

[2024 Special Needs Trusts eConference](#)

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20<sup>th</sup> Annual Changes and Trends Affecting Special Needs Trusts session  
"Medicaid in Depth - the Battle to Preserve Benefits"