

Spendedown Bill Evaluation Desk Tool

<p>Old Bills</p> <p><i>*Remember – you must verify that the bill is still the responsibility of the individual before applying it to the spenddown <u>every</u> new spenddown period!</i></p>	<p>Old bills are any unpaid medical, dental and/or remedial care expenses incurred <u>prior</u> to the retroactive period based on an initial application.</p> <p>Expenses incurred <u>prior</u> to a re-application and its retroactive period may also be deducted as old bills provided that:</p> <ul style="list-style-type: none"> ➤ They were not incurred during a prior spenddown budget period, in which spenddown eligibility was established, <i>or</i> ➤ They were incurred during the retroactive period if the individual either did not meet the retroactive spenddown or was not eligible for Medicaid in the ➤ retroactive period (for example, due to excess resources), <i>and</i> ➤ They were not fully deducted from any previous spenddown that was met, <i>and</i> ➤ They remain the liability of the individual. <p>M1340.600</p>
<p>Carry-over Expenses</p> <p><i>*Remember – an old bill can never become a carry-over expense!</i></p>	<p>Carry-over expenses are unpaid medical or remedial care expenses that:</p> <ul style="list-style-type: none"> ➤ Were incurred within a retroactive or prospective budget period in which spenddown eligibility was established, ➤ Remain the liability of the individual, <i>and</i> ➤ Were not fully counted in any previous spenddown that was met. <p>M1340.700</p>
<p>Current Payments</p> <p><i>*Remember – current payments were once old bills or carry-over expenses!</i></p>	<p>Current payments are payments made in the current spenddown budget period on unpaid balances of old bills or carry-over expenses incurred before the current spenddown budget period:</p> <ul style="list-style-type: none"> ➤ Which were not fully used in establishing eligibility in a previous spenddown budget period, <i>and</i> ➤ When there has been a break in spenddown eligibility. <p>M1340.800</p>
<p>State or Local Public Programs</p> <p><i>*Remember – State or local programs are programs that do <u>not</u> have any federal funding or administration!</i></p>	<p>Expenses for incurred medical services received</p> <ul style="list-style-type: none"> ➤ For which the applicant is or was legally liable, <i>and</i> ➤ Which were or will be provided, covered, or paid for by a state or local (or territorial) public program <p>can be deducted from the spenddown even though the applicant does not owe anything for the service.</p> <p>M1340.1100</p>
<p>Order of Applying Bills</p> <p><i>*Remember – Prepaid expenses cannot be deducted as the service has not been rendered!</i></p>	<p>Bills should be deducted from a spenddown in chronological order by date of services, then by type or service, and then by type of bill; old bill, carry-over expense, current payments.</p> <p>M1340.900</p>