

October 9, 2024



Alert

New Tools for Assisting with Medicaid Spenddown

Avisery is pleased to share a new [AABD Spenddown toolkit](#) designed to assist professionals with AABD Medicaid spenddown applications. These tools are meant to help professionals organize and track AABD spenddown medical bills and help educate beneficiaries about the program.

The Spenddown Toolkit Components

AABD Spenddown Spreadsheet Template

This spreadsheet template tool will help professionals sort, track, organize, and differentiate between all medical bills received for a spenddown application. Additionally, it will help professionals easily assess spenddown eligibility by automatically calculating key pieces of information. Click this [link](#) to download the template to your computer. A video tutorial that explains how to use the spreadsheet is available [here](#).

This spreadsheet will automatically calculate:

- The beneficiary's monthly income-spenddown amount
- The total number of months of spenddown the beneficiary will qualify for
- The amount of bills needed to qualify for an additional amount of Medicaid spenddown coverage
- The beneficiary's annual asset-spenddown amount
- The total cost of recurring bills, like premiums, from the past six months
- The total cost of one-time bills for spenddown from the past six months
- Automated color coding to easily determine if the date of the bill within the required 6-month time frame from the scheduled ABE application submission date

AABD Spenddown Presentation for Beneficiaries

The AABD Spenddown program is complex and especially difficult to teach to beneficiaries. This slide deck is designed to teach the basics of spenddown to older adults. The presentation can be shared at outreach events, or converted

into a booklet for interested applicants to keep. Click [here](#) to download the presentation file to your computer.

AABD Spenddown Letter to Beneficiary Template

This letter template is designed to send to a beneficiary after a benefit application has been approved. A professional can use the template to specify details about the beneficiary's spenddown amount, how the spenddown was calculated, what to expect after the approval, and how to maintain a spenddown. Language is intentionally designed to be simple and easy to read. Click [here](#) to download the template to your computer.

Take Our Annual Feedback Survey for a Chance To Win A Gift Card

We would truly love your participation in our [Annual Feedback Survey!](#) This survey helps us understand the needs of our professional audience and of the organizations where they work.

This anonymous survey **will take about 6-8 minutes to complete and is comprised mostly of multiple-choice questions.** If you complete the survey by **September 30th** and provide us with your contact information, your name will be entered in a drawing to win one of two \$25 gift cards!

It is very important to us to hear your thoughts! Your feedback helps shape the work that we do and offers us an opportunity to grow as a team, as a program and to grow our impact. Thank you for being a part of our Avisery community!

[Visit the Avisery Website](#)

About Avisery

Avisery by AgeOptions provides tools and support to professionals serving older adults and people with disabilities, enabling them to help their clients access healthcare coverage that allows them to thrive as they age. Contact us at avisery@ageoptions.org or [708-628-3440](tel:708-628-3440).



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