



CLIENT NAME: _____

INITIAL MEETING DATE: _____

VIRTUAL MEDICAID PLANNING PROCESS

OUR PROMISE TO YOU

A Lifetime of education and support for YOU and your FAMILY

EDUCATION	VIRTUAL INITIAL CONSULTATION	VIRTUAL MEDICAID PLANNING MEETING	SUBMIT MEDICAID APPLICATION	RESPONSE TIME FROM MEDICAID	MEDICAID DECISION AND ANNUAL RE-DETERMINATION
DATE: _____ TIME: _____	DATE: _____ TIME: _____	DATE: _____ TIME: _____	DATE: _____ TIME: _____	DATE: _____ TIME: _____	DATE: _____ TIME: _____
<ol style="list-style-type: none"> 1. Watch Rutkowski Law Firm welcome email video 2. Attend a virtual workshop 3. Participate in a Rutkowski Law Firm CE Course 	<ol style="list-style-type: none"> 1. Discuss your family goals and concerns in more detail 2. Get your questions answered 3. Make a decision and sign fee agreement 4. Introduction to Medicaid Legal Team 	<ol style="list-style-type: none"> 1. Confirm Medicaid strategy with Legal Team 2. Provide and review requested documentation 3. Provide assistance with nursing home placement when needed 	<p>WITHIN 30 DAYS *Preferred Medicaid application timeline</p> <p>Apply for Medicaid benefits with normal nursing home application once we receive all documents from you</p> <p>30 + DAYS Apply for Medicaid benefits with nursing home application and retroactive application once we receive all documents from you</p>	<ol style="list-style-type: none"> 1. Medicaid has 45 days to respond once application submitted 2. May receive denial for Medicare cost share -- DON'T PANIC 3. Medicaid mailings and requests for more documents 	<ol style="list-style-type: none"> 1. Determination notice is sent from Medicaid 2. Communication from firm about decision and next steps 3. Annual re-determination starts one year after approval 4. Must show Medicaid recipient is still eligible for benefits 5. Our firm is here to guide you for the first year



RUTKOWSKI
LAW FIRM

ASSET PROTECTION & ESTATE PLANNING

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PROVIDING PEACE OF MIND THROUGH THOUGHTFUL PLANNING