



Seminar Series Life Planning Overview

Frisco ISD



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Life Planning for Families
of Special Needs

Life Planning for Families of Special Needs

TJ Kroehle, AIF
Michael Deguchi
Blake Martino
Hillary Kent, CFP®

3500+ Families In Our Program
21 Year Old Life Planning Firm

“Defining a Reliable Future”

www.txlifeplanning.com

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For Families of Special Needs

Karen Sibilio – Director **Teresa Perales – Asst. Director**

A 501 C 3 Non-profit corporation Dedicated to Special Needs Families

- a. To host structured workshops to assist families in creating long-range care, communication and estate planning.***
- b. To support the understanding of the U.S. Social System***
- c. To provide support in the application and appeal process***

“Defining a Reliable Future”

www.forfamiliesofspecialneeds.com

For Families of Special Needs, Inc. is a 501(c) (3) non-profit organization dedicated to assisting persons with disabilities, their advocates, caregivers and families with long range care planning.



Health Information Privacy

Health Information Privacy (HIPAA)

Please Note:

The Office for Civil Rights enforces the HIPAA Privacy Rule, which protects the privacy of individually identifiable health information; the HIPAA Security Rule, which sets national standards for the security of electronic protected health information; and the confidentiality provisions of the Patient Safety Rule, which protect identifiable information being used to analyze patient safety events and improve patient safety.

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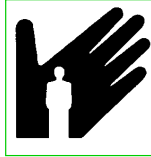
Life Planning for Families of Special Needs, Inc.

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Evaluation Form



Life Planning For Families of Special Needs Seminar Evaluation

Please take a moment to complete this evaluation. Your comments are valuable and will be used to continually improve our seminars. Thank You!

Name: _____ Date Of Seminar: _____
Address: _____
City: _____ Zip: _____
Home Phone: () _____ Business () _____
Mobile: () _____ Email: _____

1. Did the seminar cover the major areas that you expected to be covered? _____
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9. Do you currently have an estate plan? _____
10. Do you have a Will and a Special Needs Trust? _____
11. Do you intend to pursue this plan further? _____
12. Name, Age, and Diagnosis of Special Needs Child _____

FREE LIFE PLANNING CONSULTATION

A **FREE** 120 minute consultation is offered in my office to those attending this seminar. Please check the appropriate space below.

I WOULD LIKE TO AN APPOINTMENT TO PROCEED WITH MY PLAN:

Day of Week: Monday Tuesday Wednesday
Time: Morning Mid-Day Afternoon Late-Afternoon
Office Location: Addison Arlington Willow Park



If There Is One Thing To Remember From Today's Seminar

Rule #1:

What happens in a typical family is usually wrong for a Family of Special Needs.

Rule #2:

Always Remember Rule #1!

Contact Our Special Needs Life Planners For Details!



Life Planning for Families of Special Needs

Texas Waiver Programs



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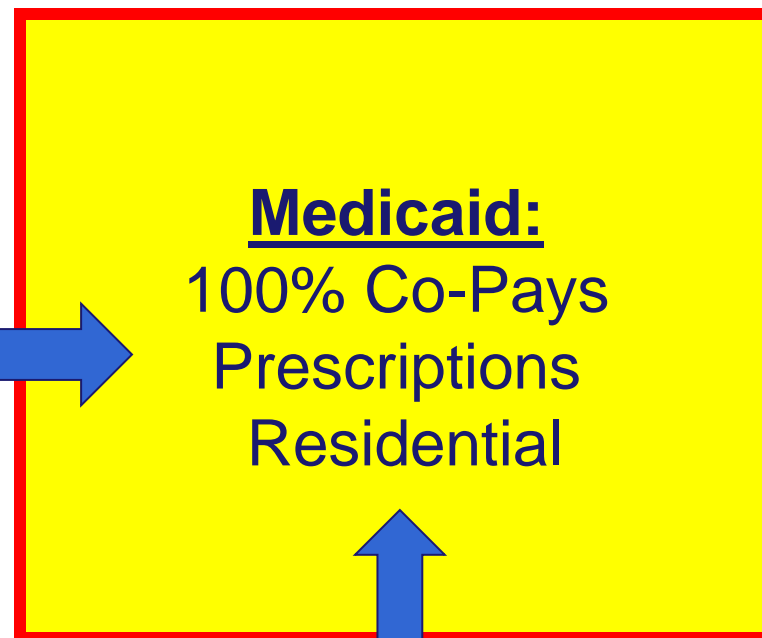
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The Two Majority Ways To Get Medicaid

Waiver Programs

If you receive a service from a Waiver Program, then you will automatically receive Texas Medicaid.



SSI Acceptance
Automatic Enrollment



The Texas Waiver Programs

- Home and Community Based Services (HCS)
- Community Living Assistant Service Support (CLASS)
- Medically Dependent Children Program (MDCP)
- Starr Plus Waiver Program
 - Community Based Alternatives (CBA)
- Deaf Blind with Multiple Disabilities (DBMD)
- Texas Home Living Program (TxHmL)
- Discontinued
 - Consolidated Waiver Program (CWP) CWP is only for those in Bexar County

Additional Information can be found at www.dads.state.tx.us



Medically Dependent Children Program (MDCP)

Open Enrollment on an Interest List. Can be on multiple waiver program interest lists.

Individuals must meet the medical criteria for admission to a Texas nursing facility and be under the age of 21. If under the age of 18, they must reside with a family member or a foster family. If over the age of 18, they must qualify for SSI.

Must be eligible for Medicaid, and have a service plan which does not cost more than the maximum for the Level of Need (LON)

Individuals choose to participate in the MDCP program instead of other Waiver programs.

Individuals enrolling in the MDCP program are provided case management by DADS staff and choose an eligible provider for services

3 to 5 Year WAIT LIST



Available Programs:

- Nursing Services
- Case Management
- Minor Home Modifications
- Adaptive Aids
- Respite Care
- Dietary/ Nutrition



CLASS Program

Available Programs:

- | | | |
|------------------------|-------------------|-------------------|
| • Therapy Programs | Nursing Services | Case Management |
| • Supported Employment | Day Habilitations | Dietary/Nutrition |
| • Minor Home Mods | Respite | Adaptive Aids |

Therapy Programs –

Physical Therapy

Music Therapy

Occupational Therapy

Aquatic Therapy

Speech/Hearing/Language Therapy

HIPPO Therapy

Transition Assistance

Psychology

Prevocational Therapy



Home & Community Based Services (HCS)

A Care Based Program

- ❖ A program with no age limit for enrollment. Open Enrollment on an Interest List. Can be on multiple waiver program interest lists. Currently a 10-12 year Wait List in most counties. Temporarily Suspended for two years (9/2011- 8/2013)

NEW IQ Based Determination

- ❖ Individuals must have either an Intellectual and Developmental Disability with an IQ below 70 or a related condition that results in deficits in adaptive behavior with a full scale IQ of 75 or below.
- ❖ Must be eligible for Medicaid, and have a service plan which does not cost more than the max for the Level of Need (LON).
- ❖ Individuals choose to participate in the HCS program instead of the ICF-MR program or other Waiver programs.
- ❖ Individuals enrolling in the HCS Program select a provider for all program services

14+ Year WAIT LIST



Home & Community Based Services

Available Programs:

- | | | |
|------------------------|----------------------|-------------------------------|
| • Residential Services | Foster Care Services | Supported Home Living |
| • Supported Employment | Day Habilitations | Specialized Therapies (OT/PT) |
| • Minor Home Mods | Respite | Adaptive Aids |
| • Nursing Services | Dental | Audiology |

Residential Programs – a residence program with no more than 3-4 individuals. They are a 3 to 4 bedroom residential home in a residential community. Individuals pay the room and board. Payment is supported through SSI or SSDI benefits. HCS funds support the personal assistant requirements.

Foster Programs – a residence program with no more than 3-4 individuals. The foster parents can be the natural parents. HCS funds support the personal assistant requirements.



How to Enroll into a Texas Medicaid Waiver Program

1. Review the Medicaid Waiver Sheet
2. Simply call the appropriate Program Provider
3. Say- “I want to be place on the Medicaid Waiver Program list for the _____
Program

CALL ASAP

#1 thing to do!!!!



The Two Ways To Get Medicaid

Double Down !

Waiver Programs

If you receive a service from a Waiver Program, then you will automatically receive Texas Medicaid.



Medicaid:
100% Co-Pays
Prescriptions
Residential

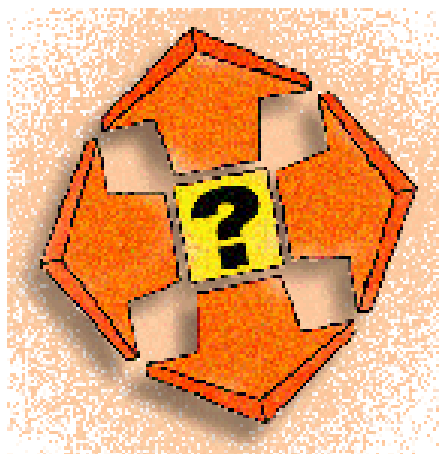


Double Down !

SSI Acceptance
Automatic Enrollment



Where Do You Go from Here?

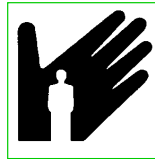


- Procrastinate
- Do It Yourself
- Work With Others
- Work With Us



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THANK YOU