

Medicaid Spend-Down Record/Transportation Log



205SD-LOG

Head of Household (HOH) name: _____

HOH Date of birth: _____ HOH Social Security #: _____

Name of Worker: _____ District: _____

The spend-down works like a deduction on a car or house insurance policy. Your Medicaid coverage could begin on the date that you meet your spend-down. This form helps you keep track of your family's medical expenses. The expenses can be for any family member, not just the person with the spend-down.

Some of the things that you can list on this log are:

- Over-the-counter medical expenses such as aspirin, antacids, laxatives, non-covered diabetic supplies, etc. that you pay for.
- Unpaid medical bills you still owe, as long as you have not already used the bill in a previous spend-down. You may use very old bills as long as you are still being billed for the charge. You must enclose a copy of the bill dated within the last 60 days. The medical bills may be from a hospital, doctor, drug store, dentist, etc.
- Payments you have made on any medical bills since the beginning of your current spend-down period.
- Medically necessary personal care services. (If you live in a Residential Community Care Home, ask your worker for the forms required for this deduction.)
- Prescription co-payments you have paid since the beginning of your current spend-down period.

If you are not sure an item may be used towards your spend-down, you should still list it on the log. Your worker will determine whether we can use it.

Name	Spend-Down Amount	Time Period
	\$	From: _____ To: _____
	\$	From: _____ To: _____
	\$	From: _____ To: _____
	\$	From: _____ To: _____

The following expenses have already been deducted from your spend-down:

- Medicare premium(s)
 Health insurance premiums
 Over-the-counter medical expenses

Please log your spend-down on the back of this form.

* **Spend-Down Log** – List any items that may be used towards your spend-down. Your worker will determine whether we can use it.

Name of family member who received service	Date service given (not the date of bill)	Name of service provider (doctor, hospital, pharmacy, etc.)	Type of service (office visit, prescription, out-patient, x-ray, etc.)	Billed to insurance or Medicare?	Bill Amount	
					Before insurance	After insurance
<i>(Example) Jane Doe</i>	<i>05/29/2014</i>	<i>Dr. Jones at Fletcher Allen Hospital</i>	<i>Check-up</i>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	\$ 100	\$ 50
				<input type="checkbox"/> Yes <input type="checkbox"/> No	\$	\$
				<input type="checkbox"/> Yes <input type="checkbox"/> No	\$	\$
				<input type="checkbox"/> Yes <input type="checkbox"/> No	\$	\$
				<input type="checkbox"/> Yes <input type="checkbox"/> No	\$	\$
				<input type="checkbox"/> Yes <input type="checkbox"/> No	\$	\$
				<input type="checkbox"/> Yes <input type="checkbox"/> No	\$	\$
				<input type="checkbox"/> Yes <input type="checkbox"/> No	\$	\$
				<input type="checkbox"/> Yes <input type="checkbox"/> No	\$	\$

* **Medical Transportation Log** – Please fill in this log if you use your own vehicle or pay someone else to take you to your medical provider for service.

Name	Date	Travel from	Travel to	Reason	Used own car (check if yes)	Paid someone else (enter \$ amount)
<i>(Example) Jane Doe</i>	<i>05/29/2014</i>	<i>Waterbury</i>	<i>Burlington</i>	<i>Appointment with Dr. Jones</i>	<input type="checkbox"/>	\$ 20
					<input type="checkbox"/>	\$
					<input type="checkbox"/>	\$
					<input type="checkbox"/>	\$
					<input type="checkbox"/>	\$
					<input type="checkbox"/>	\$
					<input type="checkbox"/>	\$
					<input type="checkbox"/>	\$
					<input type="checkbox"/>	\$

As soon as you think you have met your spend-down (or more than the lowest spend-down amount), send this log with the itemized bills to your worker. Your worker will determine whether or not anyone is eligible for Medicaid, and if not, will calculate the remaining spend-down amount. If your household size or income changes during your spend-down period, be sure to notify your worker as the change could affect your spend-down.