

## APPROPRIATE USES OF THE FUND (*EXAMPLES ONLY*)

1. Reimbursement for attendance at or participation in recreational or cultural events.
2. Travel and vacations
3. Participation in hobbies, sports or other activities.
4. Items beyond necessary food. Meals are permitted if outside the home and associated with an entertainment activity.
5. Cosmetic, extraordinary, experimental or elective medical or dental care, if not available through other third party sources.
6. Visiting friends, companionship.
7. Exercise equipment or special medical equipment if not available through other third party sources.
8. Cost differential between a shared room and a private room.
9. Equipment such as telephones, cable television, televisions, radios and other sound equipment, and camera for private use by the individual.
10. Membership in clubs such as book clubs, health clubs, record clubs.
11. Subscriptions to magazines and newspapers.
12. Small and irregular amounts of personal spending money. (No gifts are permitted).
13. Advocacy.
14. Services of a representative payee or conservator if not available through other third party sources.
15. Guardianship or other protective service not listed in ODMH or ODMR/DD rules.
16. Intervention or respite when the beneficiary is in crisis if not available through other third party sources.
17. Vocational rehabilitation or habilitation, if not available through other third party sources.
18. Reimbursement for attendance at or participation in meetings, conferences, seminars or training sessions.
19. Reimbursement for the time and expense for a companion or attendant necessary to enable the individual to access or receive supplemental services including, but not limited to, travel and vacations and attendance at meetings, conferences, seminars, or training sessions.
20. Items which Medicaid and other Governmental programs do not cover or for which they have denied payment (must show denial) or reimbursement for, even if those items include basic necessities such as physical or mental health care or enhanced versions of basic care equipment (e.g. wheelchairs) and items which are not included for payment by the per diem of the facility in which the beneficiary lives.
21. Other expenditures used to provide dignity, purpose, optimism and joy to the beneficiary of a supplemental trust. Clothing is permitted.
22. Pre-paid funeral expenses.

### **Additional examples of how the Trust funds may be utilized:**

The trust money is for “special needs” outside of food and shelter. The following is a list of things the trust money might be used for.

- Dental Care
- Plastic, cosmetic surgery or non-necessary medical procedures
- Psychological support services
- Recreation and transportation
- Differentials in cost between housing and shelter
- Supplemental nursing care and similar care which public assistance programs may not otherwise provide, including payments to those providing services in the home
- Telephone and television services
- Electric wheelchair and other mobility aids
- Furniture
- Home repairs
- Purchase of a vehicle
- Mechanical bed
- Periodic outings and vacations, including costs incurred by caretaker companions
- Hair and nail care
- Stamps and writing supplies
- More sophisticated medical, dental or diagnostic treatment, including experimental treatment, for which there are not funds otherwise available
- Private rehabilitative training
- Payments to bring in family and friends for visitation if the trustee deems that appropriate and reasonable
- Private case management to assist the primary beneficiary, or to aid the trustee in the trustee's duties
- Medication or drugs prescribed by a physician
- Drug and/or alcohol treatment
- Prepay funeral and burial expenses
- Companions for reading, driving and cultural experiences

**To protect the money, the disabled person cannot touch it directly. The trustee is not permitted to write the disabled person a check or give cash (this includes gift or prepaid debit cards). For example, to purchase a new television, the disabled person could pick out the model, get a bill from the store and present it to the trustee. The trustee would then write the check directly to the store. The trustee has the sole discretion to decide if purchases are appropriate. Because these funds are there for a lifetime, they should be for special luxuries that enhance the beneficiary's life. Because all types of trusts are complex, consult your attorney if you feel a Medicaid Payback Trust would be advantageous to you or someone you love.**