

## APPROPRIATE USES OF THE FUND (EXAMPLES ONLY)

*Please note, as regulations are re-interpreted; changes in acceptable uses may occur. We encourage representatives to call us to check on unusual uses.*

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.

**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.**