**Medical Expense Checklist**

[ ]  Are the medical bills being submitted complete? Is there a date of service and provider listed? Is the customer’s name listed?

If no, stop. The bills cannot be used if information is missing.

If yes, continue.

[ ]  Have the medical bills being submitted been used before as medical expenses? If yes, stop. The bills cannot be used again.

If no, continue.

[ ]  Have I determined the most advantageous way for the customer that the bills can be budgeted?

* Choices:
* Budget as a recurring monthly expense (most common)
* Budget as a one-time lump sum (most common)
* Budget over the remainder of the certification period
* Budget based on terms of the payment plan
* Averaged over the time period a one-time medical expense was intended to cover

[ ]  Do I need to set an expected changes alert on the case

* When budgeting a one-time lump sum expense prior to adverse action set the alert for after adverse action to run eligibility on the case
* When budgeting medical expenses over the remainder of the certification period set the alert to remove the expense at the end of the certification period
* When budgeting medical expenses based on the terms of the payment plan set an alert to remove the expense at the end of the payment plan time period

[ ]  When are benefits impacted? Is a supplement needed?