**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?