



LTC - Spenddown



Module Learning Objectives:

After completing this module, you will be able to:

- Enter one-time and recurring medical expenses on an existing case in IES
- Understand how to review the medical expense summary and spenddown history
- Understand how to view the different Eligibility pages to determine the spenddown amount, met date and certification period



Recording Medical Expenses

- Enter the required information on the medical expenses details page according to policy and the expense details
 - One-time expense
 - Split Bill expense
 - Recurring expense
 - Monthly Premiums
- Dates are very important
 - Recording the correct dates based on the customer's circumstances will allow IES to accurately calculate benefits
- You **MUST** run Eligibility every time you make a change to an existing case in IES



Use the Case Data Information Sheet – Exercise Scenario 3 – George (refer to the spenddown section)

NEXT STOP

