

YOUR CRISIS CALL CHECKLIST

- SLOW THE PACE
- IDENTIFY URGENCY
- IDENTIFY IF BILLABLE
- STOP GIVING STRATEGY
- SCHEDULE PLANNING SESSION



DO NOT:

- ×** TEACH MEDICAID RULES
- ×** ANALYZE TRANSFERS ON THE PHONE
- ×** QUOTE FEES WITHOUT SCOPE
- ×** SOLVE HYPOTHETICALS
- ×** LET PANIC RUSH YOU

CONFIDENCE COMES FROM PROCESS, NOT MEMORIZING RULES!

YOU ARE NOT A MEDICAID ENCYCLOPEDIA; YOU ARE A TRIAGE PROFESSIONAL

FIRST, SLOW THE CALL DOWN - YOUR JOB IS NOT TO SOLVE MEDICAID STRATEGY

“I’m glad you called. These situations feel urgent and there are options, but we need to look at the full picture together”

THEN BEGIN TO ASK YOUR TRIAGE QUESTIONS:

1. IS THIS URGENT?

URGENCY USUALLY MEANS:

**A FACILITY DECISION MUST BE MADE
MONEY IS ACTIVELY AT RISK
A DEADLINE AFFECTS STRATEGY**

NOT AUTOMATICALLY URGENT:

**“WE’RE JUST WORRIED”
“I HEARD MEDICAID TAKES EVERYTHING”
GENERAL QUALIFICATION QUESTIONS**

“Some situations require immediate legal planning, and some don’t. Let me ask a few questions so we know which this is.”

2. IS THIS BILLABLE?

BILLABLE:

**LEGAL JUDGMENT
MEDICAID STRATEGY
LEGAL ANALYSIS**

NOT BILLABLE:

**GENERAL MEDICAID EDUCATION
WHAT ARE THE RULES?
“CAN THEY KEEP THE HOUSE?”**

“That’s a planning question, not a quick answer – and we absolutely help families with that. The next step is a planning session where we review everything and determine the best strategy.”

3. WHAT IS THE NEXT STEP?

GOAL OF THE CALL:

**SCHEDULE A PLANNING / STRATEGY MEETING
GATHER FINANCIAL DOCUMENTS
DEFINE SCOPE OF THE REPRESENTATION**

DO NOT:

**EXPLAIN MEDICAID RULES
DESIGNING STRATEGY
ESTIMATING ELIGIBILITY OVER THE PHONE**

“Before we talk solutions, we need to review assets, income and timing. That’s what the planning meeting is for.”