FOR THE CARE PROVIDER

SAMPLE | FICTIONAL HOUSEHOLD

Medicaid Financial & Payment Summary

APPLICANT	PROGRAM AND SETTING	REPORT DATE	FIGURES
Robert Barrett	Assisted living waiver (SMMC LTC), in assisted living	November 4, 2026	Florida, July-December 2026

ESTIMATED MONTHLY PATIENT RESPONSIBILITY

$241.10

Payable to the assisted living facility, from the Qualified Income Trust. An estimate; DCF's notice sets the actual amount.

Payment arrangements

QIT required	Yes
Recommended monthly QIT deposit The minimum to keep coverage is $318.	$350.00
Patient responsibility paid from the QIT	$241.10
Room and board to the facility, from checking	$3,450.00
Room and board plus patient responsibility	**$3,691.10**

About this figure

The estimated patient responsibility once Medicaid eligibility is approved. It is not a private-pay rate: charges before eligibility, or while an application is pending, are separate and not shown. This analysis does not determine an eligibility date or the status of an application.

Payment issues requiring attention

If the state starts paying the Medicare Part B premium, the patient responsibility rises to about $444.00.

Next steps

1. The trustee sets up an automatic monthly transfer of **$350.00** from the resident's checking account to the QIT, between the 10th and the 15th of each month.
2. The trustee pays the patient responsibility from the QIT each month, directly to the assisted living facility.
3. Room and board is paid to the facility from the resident's checking account.
4. When DCF issues its notice, compare its patient responsibility with this estimate and contact us about any difference.

Questions: Zacharia Frey PLLC, 26811 South Bay Drive, Suite 270, Bonita Springs, FL 34134 | (239) 345-4545 | intake@zacfreylaw.com

Confidential. For the resident's authorized representatives and the care provider's business office or care manager only. Not for further distribution. Legal analysis by Zacharia Frey PLLC.