



EMPLOYEE SPOTLIGHT

Each quarter we will shine a spotlight on one of our favorite team members at Utah Senior Planning to have some fun and help you get to know us better. This quarter we have chosen to get up-close and personal with Case Manager and New Choices Waiver expert, Riley Rogers.

What drew you to Utah Senior Planning originally?

I actually applied to the receptionist position originally just because I was 21 and needed a better, more professional, job. But after doing that for a year I switched to Case Management. I was drawn to it because of the type of work (very detail oriented, variety of situations, creative problem solving) and because it felt good to get approvals on applications and know that it was helping someone at a very difficult time in their lives.

...continues on page 3

USP WINTER UPDATE

Hello and welcome to the quarterly Utah Senior Planning newsletter, where each quarter we plan to provide you with up-to-date information about long term care, financial planning, investments, tax planning and estate planning. In addition to keeping you informed, we also hope to get you more acquainted with our team of long term care planning experts and the many services we provide.

This quarter, we are focusing on the New Choices Waiver program. New Choices Waiver is a Medicaid program that was designed to help individuals residing in long term care facilities move into community-based settings, such as an assisted living facility or even sometimes the individual's own home, if their needs can be safely met in the chosen setting. This program is beneficial for those who desire to attain a more independent lifestyle than what is offered in a long term care setting. This program also offers financial assistance for individuals who have resided in an assisted living facility for 365 days or longer.

NEW CHOICES WAIVER

The New Choices waiver program encompasses a comprehensive set of long-term services and supports tailored to individual requirements with a diverse selection of benefits available including Adult Day Care, Chore Services, Home Modification Services, Respite Care, and more. These services can be provided in various community-based settings.

Eligibility Requirements

Age & Disability

Must be aged 18-64 years with a disability or 65 years and older.

Residential Criteria

Must be a Utah resident who meets one of the following requirements:

- Resided in a Medicaid-funded nursing home for at least 90 days.
- Received Medicare-funded care in a medical institution for a minimum of 30 days and discharged to a Medicaid-funded nursing home for a minimum of 60 days.
- Resided in an assisted living residence for at least 365 days.
- Resided in a small healthcare facility (Type N) for at least 365 days.

Financial Criteria

- Income limit equivalent to 300% of the Federal Benefit Rate (FBR)
- Asset limit of \$2,000.00 for a single applicant and \$4,000.00 for married applicants
- Home equity limit of \$713,000.00 (2024)

Medical Criteria

- Functional need for Nursing Facility Level of Care (NFLOC) determined through the InterRAI MINIMUM DATA SET - HOME CARE (MDS-HC) tool.



To schedule a free consultation regarding the New Choices Waiver program, you can call us at 801-546-9556, text 801-326-4862, or email info@utahseniorplanning.com.

How long have you worked at Utah Senior Planning?

10 years, 2 months, and 3 days

What does your job entail?

Receiving new cases from advisors, looking over the documents and reviewing bank statements, making sure that we have everything needed to submit an application, communicating with the state caseworkers and getting any other documents they require to reach an approval. Also, coming up with solutions if problems arise and advocating for clients. The New Choices Waiver side works essentially the same way with the added component of working with the assisted living facilities to get the medical documents needed to apply for that program.

What do you like most about the work you do?

I like having an extensive knowledge of Long Term Care Medicaid and New Choices Waiver to help clients and their families when they don't know how the process works or even where to begin. It is a very daunting system and I like being able to ease their anxiety and help in difficult life stages.

INDUSTRY NEWS

- Medicare Part B premium Amount increased from \$164.90 to \$174.70
- New Choices Waiver Income Eligibility Limit increased from \$2,742.00 to \$2,829.00
- Minimum Spousal Asset Share increased from \$29,724.00 to \$30,828.00
- Maximum Spousal Asset Share increased from \$148,620.00 to \$154,140.00
- Home Equity Limit increased from \$688,000.00 to \$713,000.00

FUN FACTS ABOUT LUNAR NEW YEAR CELEBRATIONS

Lunar New Year will be celebrated on February 10th in 2024.

The date that the Lunar New Year is celebrated every year is determined by the first new moon of a lunar calendar, which is based on the monthly cycles of the phases of the moon. However, the determination of the first month of a lunar year varies by culture, with many East Asian and Southeast Asian countries using a lunisolar calendar.

2024 is the year of the Dragon.

Each year of the Lunar calendar is represented by one of the 12 animals of the zodiac: rat, ox, tiger, rabbit, dragon, snake, horse, sheep, monkey, rooster, dog, and pig. Some of these animals vary according to culture.

Chinese Celebrations & Traditions

Red envelopes, or Hong Bao (in Mandarin) or Lai See (in Cantonese), filled with money are commonly given to friends and family to celebrate the new year. Red is considered a lucky color in Chinese culture and is used in many new year decorations. New year celebrations begin with the first new moon and end with the first full moon, lasting 15 to 16 days and ending with a Festival of Lanterns.

What have you gained from your work at Utah Senior Planning?

Confidence, professionalism, a job I genuinely love and, most importantly, friends that are like family and being able to work with some of the very best, most knowledgeable humans.

What do you like to do when you aren't working?

I like spending time with my husband and our 3 kids (6 year old twin girls and 18 month old boy), reading, playing video games, and watching movies.

What are three words that describe you?

Passionate, caring, honest.

What is one food you cannot resist?

Bread and Reese's chocolate in any form.

Describe an interesting hobby or pastime that you have.

I love doing puzzles, and recently I have gotten into making miniatures.

What is something on your bucket list?

To do the Lord of the Rings trail tour in New Zealand.

Vietnamese Celebrations & Traditions

Tet Nguyen Dan (Festival of the First Day) is commonly celebrated by decorating the home with yellow apricot or peach blossoms, kumquat trees, chrysanthemums, marigolds, orchids and other flowers. Sweeping during this festival is considered taboo because it symbolizes sweeping the luck away. Visiting family and the graves of ancestors as well as preparing special holiday foods, such as banh tet, banh chung, and banh day are other customary traditions.

Korean Celebrations & Traditions

The Korean New Year, or Seollal, is a three-day holiday that is typically celebrated with family. Tteokguk, a sliced rice cake soup, is traditionally served during this celebration to symbolize beginning the year with a clean mind and body. Instead of giving red envelopes, as is common in China and Vietnam, white envelopes filled with money are given.

