

You may have been told to send your excess income directly to your county, or to “spend down” your medical needs by paying out of pocket.

**A Pooled Trust
lets you use your excess
income to live in the community**



Staff are available to assist you
Monday - Friday from 9 AM to 5 PM

To enroll in the Pooled Trust

Call: (585) 546-7560 or
Email: JoinPooledTrust@cdrnys.org

For account information or questions

Call: (585) 546-7560 or
Email: PooledTrust@cdrnys.org

You can contact the Supplemental Needs Pooled Trust by mail

Center for Disability Rights
Attention: Pooled Trust
497 State Street Rochester, NY 14608

All of our forms are posted to:
www.cdrnys.org/services/pooled-trust

Supplemental Needs Pooled Trust

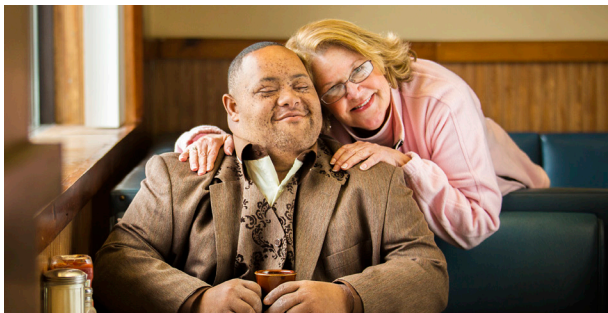


Eligibility

If you want to continue to live in the community, the Trust can assist you toward getting Medicaid to cover medical needs, or to be eligible for Medicaid waiver or billable services. It is a solution for individuals with disabilities and seniors who have too much monthly income or excessive financial resources prohibiting you from being eligible for the program.

Through this program, Trust members send their surplus income, and we pay for bills that benefit the Trust member. The money put into this account is not counted against members when applying for Medicaid, and can be used for other supplemental needs beyond what is covered by Medicaid.

Our Supplemental Needs Pooled Trust is offered in every county across New York, to state residents. Trust members must have been determined to have a disability, or must be a senior citizen of at least 65 years of age. Trust members can not be permanently living in a nursing facility.



Responsibility

Trust members (and/or their designees) are ultimately responsible for their accounts. This requires to:

Make a monthly deposit, at minimum equal to your excess income:

This is how you meet the monthly spenddown requirement for Medicaid.

Send us bills for some of your community living expenses, to be paid out of your trust account.

You need to have enough money in your account to cover payment of the bills you send to us. Bills also need to be sent to us in a timely manner.

Have sufficient funds in your account for the required trust fees.

The fees are necessary toward the operation of your Trust.

Account Management Tools

The Supplemental Needs Pooled Trust offers these tools for Trust members to manage accounts.

A Pooled Trust provides you with online monitoring

Trust members and/or their designees can monitor their individual account online. There, you can see the current account balance, deposits, disbursements, and pending transactions.

A Pooled Trust sends you text alerts

Members can sign up for text alerts for account transactions. When selected, members receive a text to inform them that a specific transaction has been processed and the status of that transaction. With text alerts, members or their designee will know right away when a payment is being processed.

A Pooled Trust sends you a monthly paper statement in the mail

Just as you would receive from a bank account, members and/or their designees receive current information about account transactions.

With a Supplemental Needs Pooled Trust, you do not need to choose between health care (Medicaid) and having sufficient funds to live in the community.