# **Index**

#### **ABUSE**

Elder Abuse, this index

## ACCOUNTABLE CARE ORGANIZATIONS

Generally, 9:28

## ADMINISTRATIVE HEARINGS

Medicaid, this index

#### ADVANCE DIRECTIVES

Generally, 2:48 et seq.

Assuring availability of documents, 2:54

Do not resuscitate (DNR) forms, 2:55

Durable powers of attorney for health care decision making, 2:46, 2:56

Guardian ad litem or guardian, decisions by, 2:57

Health care directives, 2:50, 2:51

Medical decision making, 2:49

Mental health advance directives, 2:52

Mental health advance directives, form, 2:53

Nursing homes, directives in, 2:58

POLST forms, 2:55

Purpose, 2:48

## AFFORDABLE CARE ACT

Generally, 6:11 et seq.

Appeal process for claims, 6:17

Cadillac plans, excise tax on, 6:23

CLASS long-term insurance program, 6:29

Dependent children, coverage, 6:15

Employer mandate, 6:20

Essential Health Benefits (EHBs), 6:30

Exchanges, establishment of, 6:27

Exclusions, coverage available without, 6:19

Free choice vouchers, **6:22** 

Impact on elder law practice, 6:11 to 6:36

Implementation, national and state status, 6:34, 6:35

Individual mandate, 6:25

Lifetime or annual limits, 6:13

Managed care plans, 9:1 to 9:8

Medicaid coverage, 6:35, 6:44 et seq.

Medicaid coverage, expansion of, 6:28

Notice and reporting requirements, large employers, 6:21

Payment options, 6:11 et seq.

Percentage of premiums to be used for medical care, 6:16

#### AFFORDABLE CARE ACT—Cont'd

Premiums subject to state review, 6:18

Premium tax credit, 6:32

Preventative care coverage, 6:14

Qualified health plans, 6:26, 9:1 to 9:8

Regulations regarding policy requirements, 6:31

Rescission of policies, restrictions on, 6:13

Selected features, 6:12

Small business tax credit, 6:24

Washington Health Benefit Exchange, 6:10

#### **AGREEMENTS**

Children from previous marriage, supplementary property agreement to protect, sample form and checklist, 2:17, 2:18

Community Property Agreements, this index

#### AI TECHNOLOGY

Elder Law Practice Management and Chatgpt-based, 1:34

## ALTERNATIVE STRATEGIES FOR PASSING ASSETS

Generally, 2:35

Checklist, 2:36

#### ANIMALS

Pets and Service Animals, this index

#### **ANNUITIES**

Medicaid, this index

#### APPEALS

Affordable Care Act, 6:17

Medicaid, appeal from administrative hearing, 7:66

#### APPLYING FOR BENEFITS

Medicaid

Preparing a Medicaid LTC application, 7:52

Preparing application

Generally, 7:53

Preparing a Medicaid LTC application, 7:52 et seq.

## ARTIFICIAL INTELLIGENCE

Chatbots, this index

Elder Law planning, 2:77

Generative AI, 2:77

# ASSETS

Alternative strategies for passing assets, 2:35, 2:36

Medicaid

Lien law considerations, residual value of life estate as only estate asset, 8:49

# **ASSIGNMENTS**

Medicaid eligibility

General assignment of interest, 7:63

#### ASSIGNMENTS—Cont'd

Medicaid eligibility—Cont'd

Seller's assignment of sales contract (form), 7:61

## ASSOCIATION HEALTH PLANS

Managed Care Plans, this index

## ATTORNEY-IN-FACT

Durable Powers of Attorney, this index

#### **ATTORNEYS**

Practice Management, this index

Probate, challenge to actions by, 8:5

## ATTORNEY'S FEES

Medicaid, administrative hearings, 7:73

#### **BANK ACCOUNTS**

Medicaid eligibility, letter to bank requesting account information (form), 7:54

## **BASIC RIGHTS**

Individual Rights, this index

## CADILLAC PLANS, EXCISE TAX ON

Affordable Care Act, **6:23** 

#### **CAPACITY**

Probate, conflict over capacity, 8:4

#### **CARE MANAGEMENT TRUSTS**

Generally, 3:1 et seq.

Customized supporting documents (basic)

Generally, 3:44 et seq.

Coordinated durable power of attorney

Checklist, 3:49

Financial decision making, sample form, 3:47

Health care decision making, sample form, **3:48** 

Pour-over wills

Checklist, 3:52

Married couple, sample form, 3:50

Single person, sample form, 3:51

Trust for single person, summary, sample form and checklist, 3:45, 3:46

Design of CMT, basic considerations, **3:5** 

Durable power of attorney, coordinated. Customized supporting documents (basic), above

Estate planning, 2:28

Introductory considerations, checklist, 3:7

Married couple with both spouses well (basic)

Generally, 3:17 et seq.

Article I, establishment, purpose, and general terms, sample form and checklist, **3:18**, **3:19** 

#### CARE MANAGEMENT TRUSTS—Cont'd

Married couple with both spouses well (basic)—Cont'd

Articles II-IV, directions to personal care trustee, financial management trustee, and trust monitor, sample form and checklist, **3:20**, **3:21** 

Articles VII-VIII, distribution of the rest, residue, and remainder and definitions, sample form and checklist, **3:24**, **3:25** 

Articles V-VI, personal care and budget planning and administration, sample form and checklist, **3:22**, **3:23** 

Married couple with one spouse ill (advanced)

Generally, 3:26 et seq.

Article I, establishment, purpose, and general terms, sample form and checklist, **3:27**, **3:28** 

Articles II-IV, directions to personal care trustee, financial management trustee, and trust monitor, sample form and checklist, **3:29**, **3:30** 

Articles VII-VIII, distribution of the rest, residue, and remainder and definitions, sample form and checklist, **3:33, 3:34** 

Articles V-VI, personal care and budget planning and administration, sample form and checklist, **3:31**, **3:32** 

Married couple with one spouse qualified for Medicaid (advanced)

Generally, 3:35 et seq.

Article I, establishment, purpose, and general terms, sample form and checklist, **3:36**, **3:37** 

Articles II-IV, directions to personal care trustee, financial management trustee, and trust monitor, sample form and checklist, **3:38**, **3:39** 

Articles VII-VIII, distribution of the rest, residue, and remainder and definitions, sample form and checklist, **3:42**, **3:43** 

Articles V-VI, personal care and budget planning and administration, sample form and checklist, **3:40**, **3:41** 

Planning alternatives, analyzing, 3:3, 3:4

Pour-over wills. Customized supporting documents (basic), above Single person (basic)

Generally, 3:8 et seq.

Article I, establishment, purpose and general terms, sample form and checklist, **3:9**, **3:10** 

Articles II-IV, directions to personal care trustee, financial management trustee, and trust monitor, sample form and checklist, **3:11**, **3:12** 

Articles VII-VIII, distribution of the rest, residue, and remainder and definitions, sample form and checklist, **3:15**, **3:16** 

Articles V-VI, personal care and budget planning and administration, sample form and checklist, **3:13**, **3:14** 

Structure of CMT an overview of sample versions, 3:6

Supporting documents. Customized supporting documents (basic), above Trust concept

Generally, 3:1

Checklist, 3:2

# **CHATBOTS**

Advance planning in elder law, **1:26 et seq.** Chatsonic comments in Elder law, **1:27** 

#### **CHATGPT**

See index heading Elder Law practice Management and Chatgpt

Generative AI

Elder Law planning, 2:77

## CHATGPT-BASED SUPPORT

Generally, 2:77 et seq.

Elder Law planning

Impact of ChatGPT technology

Generally, 2:79 et seq.

Client representation, 2:80

Document preparation, 2:82

Legal research, 2:81

Managing client files, 2:83

Marketing and networking, 2:83

Preparing for disruptions, 2:86

Resource management, 2:85

Impact of the Washington Rules of Professional Conduct (RPCs), 2:78

Use of AI support, 2:78

## CLASS LONG-TERM INSURANCE PROGRAM

Affordable Care Act, 6:29

## **CLIENT REPRESENTATION**

Chatgpt-based support, 2:80

Medicaid qualification, 7:80

## **COMMUNITY PROPERTY AGREEMENTS**

Generally, 2:30 et seq.

Checklists, 2:32, 2:34

Probate alternatives, notice of property transfer through agreement, sample form, **8.47** 

Revocation of agreement, sample form and checklist, 2:33, 2:34

Sample form, 2:31

# CONVERSION

Violation of financial rights, 5:10

## **CORONAVIRUS**

COVID-19, this index

#### COVID-19

Generally, 1:1 et seq.

Court operations, 1:22 et seq.

Elder law

Chatsonic comments, 1:27

Estate planning and probate, 1:12 et seq.

Guardianships, 1:19 et seq.

Medicaid applications, 1:4 et seq.

## **CREDITORS**

Probate, this index

#### **DECEDENTS' ESTATES**

Probate, this index

Wills and Trusts, this index

# DEPENDENT CHILDREN, COVERAGE

Affordable Care Act, 6:15

#### DISABILITY

Disability and estate tax planning, 2:23, 2:26

Personal representative, declination due to disability, 8:17

#### **DISABILITY PROGRAM DESIGN**

Generally, 6:53

Retirement, 6:53

#### **DISCRIMINATION**

Individual rights, 5:6

#### DISSOLUTION OF MARRIAGE

Medicaid eligibility, dissolution or legal separation as option, 7:50

## DOCUMENT PREPARATION

Chatgpt-based support, 2:82

Medicaid qualification, 7:82

## DOMESTIC PARTNERSHIPS

Probate, issues related to statutory rights, 8:10

# DO NOT RESUSCITATE (DNR)

Forms, 2:55

#### **DURABLE POWERS OF ATTORNEY**

Generally, 2:37 et seq.

Care management trusts, coordinated durable power of attorney, 3:47 to 3:49

Certification of copies, 2:44

Client protection, 2:44

Divided authority

Checklist, 2:47

Financial decision making (springing), sample form, 2:45

Health care decision making (springing), sample form, 2:46

Financial and health care decision making

Care management trusts, coordinated durable power of attorney, 3:47 to 3:49

Immediate, sample form and checklist, 2:38, 2:39

Springing, sample form and checklist, 2:40, 2:41

Health care decision making, 2:46, 2:56

Pets and service animals, care arrangements, 2:65

Resignation of attorney-in-fact, sample form, 2:42

Revocation, sample form, 2:43

# **ELDER ABUSE**

Generally, 5:15 et seq.

Checklist, 5:18

Evaluation, 5:17

#### ELDER ABUSE—Cont'd

Inheritance rights of slayers and abusers, restrictions on, 5:13

Mental abuse, 5:4

Physical abuse, **5:4** 

Practice implications, 5:15

Recognition, 5:17

Remedies, 5:19

Undue influence, 5:16

#### **ELDER LAW PLANNING**

Generally, 2:77 et seq.

Artificial intelligence, 2:77

#### ELDER LAW PRACTICE MANAGEMENT AND CHATGPT-BASED

AI technology, 1:34

Forms

Generally, 1:34 to 1:51

Basic activities for legal practices, 1:35

Conceptual Interpretation Of ChatGPT Performance, 1:51

Drafting and finalizing documents

Without or with ChatGPT, 1:43

Drafting and finalizing documents, all stages and methods, 1:42

Legal research

Without or with ChatGPT, 1:41

Legal research, both background and clients, 1:40

Managing client files, with all associated records, 1:44

Managing files

Without or with ChatGPT, 1:45

Managing resources, 1:48

Without or with ChatGPT, 1:49

Marketing and networking, 1:46

Without or with ChatGPT, 1:47

Meetings with clients, teams or legal representatives, 1:36

Meetings with clients or legal representatives

Without and With ChatGPT, 1:37

Preparing for possible disruptions

Impact of Super-Chatbot support, 1:50

Representation of clients

For all types of activities, 1:38

Without or with ChatGPT, 1:39

Technology, 1:34

## **EMPLOYER MANDATE**

Affordable Care Act, 6:20

## ERISA EMPLOYER PLANS

Managed Care Plans, this index

# **ESSENTIAL HEALTH BENEFITS (EHBS)**

Affordable Care Act, 6:30

#### ESTATE TAX PLANNING

Generally, 2:23 et seq.

Care management trusts, 2:28

Care planning vs. tax planning, 2:25

Disability and estate tax planning

Checklist, 2:26

Trends, 2:23

Post-mortem tax planning, 8:8

Requirements of tax planning, 2:24

Will with alternative credit shelter, disclaimer, and QTIP trust provisions, sample form, 2:27

Will with combined special needs trust/credit shelter trust provisions, sample form, 2:29

## **EXCHANGES, ESTABLISHMENT OF**

Affordable Care Act, 6:27

#### **EXCLUSIONS, COVERAGE AVAILABLE WITHOUT**

Affordable Care Act, 6:19

#### **FAIR HEARINGS**

Medicaid, this index

## FINANCIAL PLANNING

Planning Strategies, this index

## FINANCIAL RIGHTS

Generally, 5:9 et seq.

Checklist, violation of rights, 5:14

Conversion, 5:10

Fraud, 5:11

Gifting, forced, 5:12

Inheritance rights of slayers and abusers, restrictions on, 5:13

Misrepresentation, 5:11

Theft, 5:10

Undue influence, 5:9

#### **FRAUD**

Violation of financial rights, 5:11

# FREE CHOICE VOUCHERS

Affordable Care Act, 6:22

#### **GIFTING**

Forced gifting, 5:12

Medicaid, this index

## **GUARDIAN AD LITEM**

Advance directives, decisions by guardian ad litem or guardian, 2:57 Order appointing, sample form, 4:15

# GUARDIANSHIPS AND LESS RESTRICTIVE ALTERNATIVES

Generally, 4:1 et seq., 4:7

#### GUARDIANSHIPS AND LESS RESTRICTIVE ALTERNATIVES—Cont'd

Advance directives, decisions by guardian ad litem or guardian, 2:57

Defending against petition, 4:25

Involuntary placement and mental health treatment, 4:6

Least restrictive alternatives, 4:5

Mental health treatment, involuntary placement and, 4:6

Notice of guardianship petition, sample form, 4:14

Order appointing guardian of person and estate, sample, prior RCW Ch. 11.88/11.92, **4:16** 

Petition for guardianship, sample form, 4:11

Tracking of guardianships, 4:2, 4:4

Unnecessary guardianship action, 5:5

Veterans Administration guardianships, 4:17

Washington Guardianship, Conservatorship, and Alternatives Act (WGCAA), 4:1

## GUARDIANSHIPS HOSPITAL DISCHARGE AND MEDICAD LTC ISSUES

Overlapping issues, 4:26

#### **HEALTH CARE**

Affordable Care Act, this index

Medicaid, this index

Medicare, this index

## **HEALTH CARE DIRECTIVES**

Generally, 2:50

Sample form, 2:51

# HEALTH REIMBURSEMENT ARRANGEMENTS (HRAS)

Generally, 9:27

#### **HEARINGS**

Medicaid, this index

## **HUSBAND AND WIFE**

Medicaid eligibility, dissolution or legal separation as option, 7:50

## IMPLEMENTATION, NATIONAL AND STATE STATUS

Affordable Care Act, 6:34, 6:35

#### INDIVIDUAL MANDATE

Affordable Care Act, 6:25

# INDIVIDUAL RIGHTS

Generally, **5:1 et seq.** 

Adequate care, lack of, 5:2

Checklist of basic rights, 5:8

Discrimination, 5:6

Guardianship action, unnecessary, 5:5

Mental abuse, 5:4

More restrictive care than required, 5:3

Physical abuse, 5:4

#### INDIVIDUAL RIGHTS—Cont'd

Private facts and affairs, public disclosure, 5:7

#### **INHERITANCES**

Medicaid, this index

Restrictions on rights of slayers and abusers, 5:13

#### **INSURANCE**

Medicaid eligibility, letter to insurance company requesting policy information (form), **7:55** 

## **INTENT**

Client Intent, this index

#### INTER VIVOS TRUSTS

Wills and Trusts, this index

#### **JOINT TENANCIES**

Probate alternatives, notice of property transfer through joint tenancy, sample form, **8:46** 

## LARGE EMPLOYER PLANS

Managed care plans, 9:18 to 9:23

# LAW PRACTICE

Practice Management, this index

## LEGAL RESEARCH

Chatgpt-based support, 2:81

Medicaid qualification, 7:81

#### LIENS

Medicaid, liens and claims against tort settlement, 7:67, 7:70

## LIFETIME OR ANNUAL LIMITS

Affordable Care Act, 6:13

# LONG-TERM CARE

Community First Choice Program, 6:69

MAC and TSOA Programs, 6:70

Medicaid

Income, 6:3

Resources, 6:2

Medicaid, this index

Medicaid Alternative Care (MAC), 6:63

Medicaid Transformation Program waiver, 6:67

Options

Generally, 6:60 et seq.

Alternative care options, 6:5

Estate recovery, 6:7

Impact on elder law planning, 6:8

Payment options, 6:1 et seq.

Preferred care options, determining, 6:61

## LONG-TERM CARE—Cont'd

Options—Cont'd

Transfer of asset rules, 6:4

Trusts, annuities and life estates, 6:6

PACE Program, 6:65

Resource materials, 6:68

Roads to Community Living Program, 6:66

Tailored Supports for Older Adults (TSOA), 6:63

Waivers for Medicaid, 6:64

Washington Long-Term Care Trust Act, 6:71

#### MAII

Probate, declaration of mailing, 8:24

#### MANAGED CARE ORGANIZATIONS (MCOS)

Managed Care Plans, this index

#### MANAGED CARE PLANS

Accountable Care Organizations (ACOs), 9:28

Affordable Care Act and qualified health plans, 9:1 to 9:8

Health Reimbursement Arrangements (HRAs), 9:27

Large employer plans and ERISA, 9:18 to 9:23

Medicaid and Managed Care Organizations, 9:9 to 9:17

Medicare Advantage Plans, 9:24

MEWAs and Association Health Plans, 9:25

Short-term limited duration (STLD) plans, **9:26** 

#### MANAGED CARE PLANS AND ELDER LAW

Generally, 9:1 et seq.

#### MANAGING CLIENT FILES

Chatgpt-based support, 2:83

Medicaid qualification, 7:83

#### **MARKETING**

Chatgpt-based support, 2:84

## MARKETING AND NETWORKING

Medicaid qualification, 7:84

## **MEDICAID**

Generally, 6:37 et seq., 7:1 et seq.

Administrative code, Washington State, 6:52

Administrative or "fair" hearings

Generally, 7:71 et seq.

Appeal process, 7:66

Attorney's fees, 7:73

Initial administrative hearing, 7:72

Affordable Care Act, 6:37, 6:43 et seq.

Affordable Care Act, expansion of coverage, 6:28

Annuities

Client disclosure form, 7:39

```
MEDICAID—Cont'd
Annuities—Cont'd
  Irrevocable annuities, 7:37
Applying for benefits
   Application letter, form, 7:46
   Attachments, sample list (form), 7:57
   Bank account information, letter to bank requesting (form), 7:54
   Checklist, 7:58
  Insurance policy information, letter to insurance company requesting (form),
       7:55
  Preparing a Medicaid LTC application, 7:52
Bank account information, form for letter to bank, 7:54
Care Management Trusts, this index
Cash allocation, treatment of income. 7:29
Change of care location, eligibility regulations, 7:26
Changes to resources, obtaining eligibility through, 7:45
Checklists
   Applying for benefits, 7:58
   Eligibility regulations, 7:35
  Long-term care, 7:46
   Supplementary considerations, 7:51
  Transferring resources and maintaining eligibility, 7:65
Claims and liens against tort settlement, 7:67, 7:70
COVID-19, 1:4 et seq.
Discharge from facility, eligibility regulations, 7:25
Dissolution or legal separation as eligibility option, 7:50
Distribution of funds
   Generally, 7:68
   Restrictions on distribution, 7:66
Donated goods and services not considered to be income, 7:49
Eligibility
   Generally, 7:24 et seq.
   A-Z manual, Washington State, 6:52
  Cash allocation, 7:29
   Change of care location, 7:26
   Checklist, 7:35
  Discharge from facility, 7:25
  Dissolution or legal separation as option, 7:50
  Excess resources and/or income, retaining, 7:47
  Exempt resources and gifting, impact on eligibility, below
  Financial eligibility, 7:27
   Goods and services, donated, not considered to be income, 7:49
   Income, treatment of, 7:29
  Initial eligibility evaluation, 7:44
  Long-term care, eligibility requirements, 7:10 et seq., 7:46
   Medical eligibility, 7:24
  Resources, treatment of, 7:28
```

Summary of requirements, 7:34

# MEDICAID—Cont'd Eligibility—Cont'd Supplementary considerations, 7:47 to 7:51 Third-party financial obligation, 7:48 Transferring resources and maintaining eligibility, below Trusts, below Excess resources and/or income, retaining, 7:47 Exempt resources and gifting, impact on eligibility Generally, 7:36 et seq. Annuities Client disclosure form, 7:39 Irrevocable annuities, 7:37 Changes to resources, obtaining eligibility through, 7:45 Client disclosure form, annuities, 7:39 Initial eligibility evaluation, 7:44 Irrevocable Annuities, 7:37 Trusts, 7:42 Issues related to gifting Transfers of assets, 7:43 Life expectancy tables, 7:38 Long-term care assistance, checklist, 7:46 Overview, exempt resources, 7:36 Trusts, below Fair hearings. Administrative or "fair" hearings, above Federal statutes and regulations, overview, 6:38 Financial eligibility, 7:27 Resource limits, exempt resources, 7:30 Resource standards (2023), 7:31 Gifting. Exempt resources and gifting, impact on eligibility, above Goods and services, donated, not considered to be income, 7:49 Hearings. Administrative or "fair" hearings, above Income, treatment of, 7:29 Information sources, 6:38 Inheritances. Tort settlements and inheritances, below Insurance policy information, letter to insurance company requesting (form), Introduction to program requirements, 7:1 Investments, evaluation in Medicaid context, 2:60 Liens Probate, law and estate recovery, 8:48 Probate, lien law considerations during, 8:49 Tort settlement, liens and claims against, 7:67, 7:70 Life expectancy tables, 7:38 Long-term care Alternative care options, 7:5 Applications, 7:15 Basic eligibility requirements, 7:10 et seq.

```
MEDICAID—Cont'd
Long-term care—Cont'd
  Changes in program organization, 7:22
  Checklist, 7:46
  COPES program, 7:14
  COPES program, financial disregards, 7:14
  Documenting income, 7:12
  Documenting resources, 7:11
  Estate recovery, 7:7
  Exempt resources, 7:16 et seq.
  Gifting, 7:17
  Income, 7:3
  Institutional and alternative care, 7:13
  Lien law, 7:20
  Managing income and resources while receiving benefits, 7:64
  Payment of participation amount, 7:19
  Programs, 6:62, 6:63
  Resources, 7:2
  Restrictions reducing assistance, 7:21
  Same-sex marriage issues, 7:23
  Transfer of asset rules, 7:4
  Transferring resources, 7:18
  Trusts, annuities and life estates, 7:6
LTC, guardianship, and Hospital discharge
  Overlapping issues, 7:76
Managed care plans, 9:9 to 9:17
Medicaid qualifying trusts, 7:40
Medical eligibility, 7:24
Pressures for change, 6:37
Probate, lien law and estate recovery, 8:48
Probate, lien law considerations, 8:49
Qualification, CHATGPT-based support
  Generally, 7:77 et seq.
  Generative AI, 7:77
  Impact of ChatGPT technology, Initial client meetings, 7:79 et seq.
     Client representation, 7:80
     Document preparation, 7:82
     Legal research, 7:81
     Managing client files, 7:83
     Marketing and networking, 7:84
     Preparing for disruptions, 7:86
     Resource management, 7:85
  Impact of the Washington Rules of Professional Conduct (RPCs), use of AI
       support, 7:78
Quitclaim deed (form), 7:62
Resource limits, exempt resources
```

Financial eligibility, 7:30

# MEDICAID—Cont'd Resources Excess resources and/or income, retaining, 7:47 Transferring resources and maintaining eligibility, below Resources, treatment of, 7:28 Resource standards (2023) Financial eligibility, Resource limits and exempt Resources, 7:31 Revocable or Irrevocable trusts, 7:42 Sales contract, seller's assignment (form), 7:61 Sole benefit trusts, 7:41 Sources of information, 6:38 State plans Federal requirements, 6:40 to 6:42 Washington State plan, 6:43 Third-party financial obligations, 7:48 Tort settlements and inheritances Generally, 7:66 et seq. Claims and liens against tort settlement, 7:67, 7:70 Restrictions on distribution, 7:66 Transferring resources and maintaining eligibility Generally, 7:59 et seq. Checklist, 7:65 Documentation for transfer, 7:60 General assignment of interest (form), 7:63 Managing income and resources while receiving long-term care benefits, 7:64 Quitclaim deed (form), 7:62 Sales contract, seller's assignment (form), 7:61 Trusts Medicaid qualifying trusts, 7:40 Revocable or Irrevocable trusts, 7:42 Sole benefit trusts, 7:41 Waivers. **6:43** Washington State Administrative code and eligibility A-Z manual, 6:52 Liens and adjustments or recovery After Affordable Care Act, 6:45 et seq. Plan Generally, 6:43 to 6:52 After Affordable Care Act, 6:45 et seq. Before Affordable Care Act, 6:44 Statutes, 6:43

## MEDICAID LTC, GUARDIANSHIP, AND HOSPITAL DISCHARGE

Overlapping issues, 7:76

# MEDICAL CARE

Health Care, this index

#### **MEDICARE**

Hospital services covered, 6:57

Medicare Advantage Plans, 9:24

Part B coverage, 6:59

Pressures for change, 6:54

Program details, 6:54

Program Operations Manual System (POMS), 6:56

Skilled nursing facility services, 6:58

Statutes and regulations, 6:55

## MENTAL HEALTH ADVANCE DIRECTIVES

Generally, 2:52

Form, 2:53

## MENTAL HEALTH TREATMENT

Guardians, involuntary placement, 4:6

# **MISREPRESENTATION**

Violation of financial rights, 5:11

## **NETWORKING**

Chatgpt-based support, 2:84

## **NOTICE**

Affordable Care Act, 6:21

Probate, this index

#### **NURSING HOMES**

Advance directives, 2:58

## **PANDEMIC**

COVID-19, this index

## PATIENT PROTECTION AND AFFORDABLE CARE ACT

Affordable Care Act, this index

## PERCENTAGE OF PREMIUMS TO BE USED FOR MEDICAL CARE

Affordable Care Act, 6:16

## PERSONAL REPRESENTATIVE

Probate, this index

#### PETS AND SERVICE ANIMALS

Generally, 2:62 et seq.

Durable power of attorney, care arrangements through, 2:65

Trusts

Generally, 2:63

Planning for establishment of trust, 2:64

Preparing trust documents, 2:66

# PLANNING STRATEGIES

Generally, 2:1 et seq.

Advance Directives, this index

Alternative strategies for passing assets, 2:35, 2:36

#### PLANNING STRATEGIES—Cont'd

Community Property Agreements, this index

COVID-19, **1:12** et seq.

Durable Powers of Attorney, this index

Estate Tax Planning, this index

Financial limitations, impact of, 2:2

Financial planning, realistic, to support elder law legal planning, 2:59

Investments, evaluation in Medicaid context, 2:60

Pets and Service Animals, this index

Retirement plans, 2:61

Super-chatbots, using, 1:26 et seq.

Wills and Trusts, this index

#### **POWERS OF ATTORNEY**

Durable Powers of Attorney, this index

#### PREMIUMS SUBJECT TO STATE REVIEW

Affordable Care Act, 6:18

## PREMIUM TAX CREDIT

Affordable Care Act, 6:32

# PREPARE FOR DISRUPTIONS

Chatgpt-based support, 2:86

#### PREPARING FOR DISRUPTIONS

Medicaid qualification, 7:86

#### PREVENTATIVE CARE COVERAGE

Affordable Care Act, 6:14

#### PRIVACY RIGHTS

Guardianship, 4:18

Public disclosure of private facts and affairs, 5:7

#### **PROBATE**

Generally, 8:1 et seq.

Activities

Generally, 8:13

Start-up activities for testate, nonintervention probate, below

Affidavit of successor for delivery of property, sample form, 8:45

Alternative setting with no will and full intervention required

Generally, 8:40

Checklist, intestate estate, 8:43

Personal representative (intestate probate), petition and order appointing, sample forms, **8:41**, **8:42** 

Alternatives to probate

Generally, 8:44 et seq.

Affidavit of successor for delivery of property, sample form, 8:45

Community property agreement, notice of property transfer through, sample form, **8:47** 

Joint tenancy, notice of property transfer through, sample form, 8:46

#### PROBATE—Cont'd

Attorney, challenges to actions by, 8:5

Capacity, conflict over, 8:4

Checklists

Closing testate, nonintervention probate, 8:39

Filing testate, nonintervention probate, 8:20

General issues, 8:7

Initial actions for testate probate, 8:27

Intestate estate, 8:43

Closing testate, nonintervention probate

Generally, 8:32 et seq.

Checklist, 8:39

Declaration of completion (sample forms)

Generally, 8:34

Notice of filing declaration, 8:35

Waiver of 30-day notice of declaration, 8:36

Final accounting and intention to distribute estate, notice of, sample form, 8:33

Motion and order closing estate, sample form, 8:38

Receipt of heir, sample form, 8:37

Waiver of 30-day notice of declaration of completion of probate, sample form, **8:36** 

Community property agreement, notice property transfer through, sample form, 8:47

Contrasting types of probate, 8:12

Creditors

Claims, 8:28 et seq.

Notice to, sample form, 8:23

Partial rejection of claim, notice of, sample form, 8:30

Rejection of claim, notice of, sample form, 8:31

Satisfaction of claim, sample form, 8:29

Declaration of completion. Closing testate, nonintervention probate, above

Declaration of mailing, sample form, 8:24

Delivery of property, successor's affidavit, sample form, 8:45

Disputes, 8:6

Domestic partnerships, issues related to statutory rights, 8:10

Estate

Disputes, 8:6

Final accounting and intention to distribute estate, notice of, sample form, **8:33** Full intervention probates

Generally, 8:11

Alternative setting with no will and full intervention required, above

Intestate probate, 8:41 et seq.

Inventory and appraisement by personal representative, sample form, 8:22

Joint tenancy, notice of property transfer through, sample form, 8:46

Mailing, declaration of, sample form, 8:24

Medicaid lien law and estate recovery

Generally, 8:48

#### PROBATE—Cont'd

Medicaid lien law considerations

Residual value of life estate as only estate asset, 8:49

Motion and order closing estate, sample form, 8:38

Noncontested will and nonintervention powers (basic probate)

Generally, 8:14 et seq.

Admitting will to probate, petition and order (sample forms), 8:15, 8:16

Checklist, filing testate, nonintervention probate, 8:20

Developing probate plan, 8:14

Personal representative (sample forms)

Disability, declination due to, 8:17

Oath, 8:19

Spouse's declination due to no community property, 8:18

Start-up activities for testate, nonintervention probate, below

Nonintervention probates

Generally, 8:11

Closing testate, nonintervention probate, above

Noncontested will and nonintervention powers, above

Start-up activities for testate, nonintervention probate

Notice

Community property agreement, notice property transfer through, sample form, **8:47** 

Completion of probate, notice of filing declaration, sample form, 8:35

Creditors, notice to, sample form, 8:23

Final accounting and intention to distribute estate, notice of, sample form, 8:33

Joint tenancy, notice property transfer through, sample form, 8:46

Rejection of creditor's claims, sample forms, 8:30, 8:31

Personal representative

Challenges to actions, 8:5

Disability, declination due to, sample form, 8:17

Instructions to, sample form, 8:26

Intestate probate, petition and order appointing, sample forms, 8:41, 8:42

Inventory and appraisement, sample form, 8:22

Oath, sample form, 8:19

Spouse's declination due to no community property, sample form, 8:18

Probate

Activities, 8:13

Receipt of heir, sample form, 8:37

Receipt of probate documents, sample form, 8:25

Same-sex marriage, 8:2

Special needs trust, court-ordered, 8:9

Start-up activities for testate, nonintervention probate

Generally, 8:21 et seq.

Checklist, initial actions for testate probate, 8:27

Creditors, notice to, sample form, 8:23

Declaration of mailing, sample form, 8:24

Instructions to personal representative, sample form, 8:26

#### PROBATE—Cont'd

Start-up activities for testate, nonintervention probate—Cont'd

Inventory and appraisement by personal representative, sample form, 8:22

Receipt of probate documents, sample form, 8:25

Successor's affidavit for delivery of property, sample form, 8:45

Tax planning, post-mortem, 8:8

Will and other legal document, conflict between, 8:3

# PROTECTIVE ACTIONS

Generally, 5:19 et seq.

Vulnerable adults from abusive actions, 5:19

## **QUALIFIED HEALTH PLANS**

Affordable Care Act, 6:26, 9:1 to 9:8

# **QUITCLAIM DEEDS**

Medicaid eligibility, 7:62

# RESCISSION OF POLICIES, RESTRICTIONS ON

Affordable Care Act, 6:13

## RESOURCE MANAGEMENT

Chatgpt-based support, 2:85

Medicaid qualification, 7:85

## RETIREMENT PLANS

Generally, 2:61

#### RIGHTS OF ELDERLY CLIENTS

Elder Abuse, this index

Financial Rights, this index

Individual Rights, this index

Protective Actions, this index

Public Agencies, this index

# **SAME-SEX MARRIAGE**

Probate, 8:2

# **SERVICE ANIMALS**

Pets and Service Animals, this index

#### **SETTLEMENTS**

Tort settlements. Medicaid, this index

## SMALL BUSINESS TAX CREDIT

Affordable Care Act, 6:24

#### TAX PLANNING

Estate Tax Planning, this index

Post-mortem tax planning, 8:8

## TEMPORARY RESTRAINING ORDERS

Protective Actions, this index

#### TESTAMENTARY TRUSTS

Wills and Trusts, this index

#### THEFT

Violation of financial rights, 5:10

#### TORT SETTLEMENTS

Medicaid, this index

# TRANSFERRING RESOURCES

Medicaid, this index

#### **TRUSTS**

Care Management Trusts, this index Wills and Trusts, this index

#### UNDUE INFLUENCE

Elder abuse, 5:16

Violation of financial rights, 5:9

## **VULNERABLE ADULT**

Adult Protective Services, 5:20

Protective Actions, this index

Vulnerable Adult Abuse Registry, 5:20

# WASHINGTON GUARDIANSHIP, CONSERVATORSHIP, AND ALTERNATIVES ACT (WGCAA)

Generally, 4:1

Collection and evaluation of information

Generally, 4:23 to 4:25

Procedure, 4:24

Comparing to prior RCW Ch. 11.88/11.92 notice of petition forms, 4:13

Comparing to prior RCW Ch. 11.88/11.92 petition forms, 4:10

Features, 4:3

Forms, **4:8** 

Legal action, 4:20

Notice of petition, **4:12** 

Order Pattern form, conclusions to be provided for, 4:22

Petition for appointment of a guardian, conservator, or protective arrangement, pattern form, **4:9** 

Petition pattern form, conclusions to be provided for, 4:21

Privacy rights and HIPAA, 4:18

Reference resources for supported decision making, 4:19

Requirements

Generally, 4:8

Tracking of guardianships, 4:2

## WASHINGTON HEALTH BENEFIT EXCHANGE

Affordable care act, 6:10

# WASHINGTON LONG-TERM CARE TRUST ACT

Generally, 6:71

#### WILLS AND TRUSTS

Generally, 2:5 et seq.

Animals. Pets and Service Animals, this index

Attesting witnesses, affidavit, 2:9, 2:10

Basic wills

Generally, 2:5 et seq.

Attesting witnesses, affidavit, 2:9, 2:10

Checklist, 2:11

Married person, 2:5, 2:6

Single person, **2:7, 2:8** 

Care Management Trusts, this index

Checklist of trust design issues, 2:76

Children from previous marriage, supplementary property agreement to protect, sample form and checklist, **2:17**, **2:18** 

Conflict between will and other legal document, 8:3

Design issues for trusts, 2:67 et seq.

Disabled child, will with special needs trust, sample form and checklist, 2:19, 2:20

Educational trust for child, will with, sample form and checklist, 2:21, 2:22

Ill spouse, will with testamentary special needs trust, 2:14

Inter vivos and testamentary trusts

Generally, 2:12 et seq.

Children from previous marriage, supplementary property agreement to protect, sample form and checklist, **2:17**, **2:18** 

Disabled child, will with special needs trust, sample form and checklist, 2:19, 2:20

Educational trust for child, will with, sample form and checklist, 2:21, 2:22

Ill spouse, will with testamentary special needs trust, 2:14

Issues related to, 2:12

Reciprocal trusts to protect both spouses against future illnesses, **2:14** Special needs

Disabled child, will with special needs trust, sample form and checklist, 2:19, 2:20

Ill spouse, will with testamentary special needs trust, 2:14

Reciprocal trusts to protect both spouses against future illnesses, 2:14

Will with combined special needs trust/credit shelter trust provisions, sample form, 2:29

Will with special needs trust for spouse, sample form and checklist, 2:15, 2:16

Trust applications, 2:13

Irrevocable trusts, 2:67, 2:71 to 2:74

Mandatory and optional gap-filler statutes, 2:69

Married person, basic will and sample form, 2:5, 2:6

Medicaid eligibility, 7:40 to 7:42

Pets and Service Animals, this index

Pour-over wills, 3:50 to 3:52

Probate, this index

Reciprocal trusts to protect both spouses against future illnesses, 2:14

## WILLS AND TRUSTS—Cont'd

Revocable trusts, 2:67, 2:70

Single person, basic will and sample form, 2:7, 2:8

Special needs

Inter vivos and testamentary trusts, above

Probate, court-ordered trust, 8:9

Spouses

Ill spouse, will with testamentary special needs trust, 2:14

Reciprocal trusts to protect both spouses against future illnesses, 2:14

Will with special needs trust for spouse, sample form and checklist, 2:15, 2:16

Statutes

Generally, 2:3

Impact of statutory changes on preparation of wills and trusts, 2:4

Structure, wording, and integration of trust, 2:75

Tax planning

Will with alternative credit shelter, disclaimer, and QTIP trust provisions, sample form, 2:27

Will with combined special needs trust/credit shelter trust provisions, sample form, 2:29