

REQUEST FOR REIMBURSEMENT

BENEFICIARY: _____

CO-TRUSTEE: _____

CARETAKER (Timesheet Attached)

CATEGORY TOTAL \$

Number of Hours Worked: _____
Hourly Rate: _____

TRANSPORTATION (Receipts Attached)

% Used on behalf of Beneficiary: _____

Gas/Fuel: _____
Mileage: _____
Repair/Maintenance (Total) : _____
Car Payments (must have lien on file): _____
Insurance/Tag: _____

SUPPLIES (Receipts Attached)

Clothing: _____
Personal Hygiene/Grooming: _____

EDUCATION (Receipts Attached)

Tuition (School, Camps, Classes): _____

MEDICAL AND THERAPIES(Receipts Attached)

Doctor/Medical Visits: _____
Therapy/Rehabilitation Visits (OP/PT): _____
Medical Supplies: _____
Medications: _____

ENTERTAINMENT (Receipts Attached)

*Any dining costs in excess of \$20 is considered as income by SSI/SSDI and Medicaid and must be reported monthly.
It is the responsibility of the Co-Trustee to report income.*

Movie/Concert Tickets: _____
Dining: _____
Cable (Hulu, Netflix, etc.): _____
Internet: _____
Recreational Activities: _____
Other (CD's, Books, Lessons, Hobby, Electronics, etc.) _____

HOUSEHOLD (Receipts Attached)

Number in Household: _____

Phone Service/Cell Phone (Beneficiary Only): _____
Household Cleaning Supplies: _____
Maintenance/Repairs/Modifications: _____

*The following household expenses are considered as income by SSI/SSDI and Medicaid and must be reported monthly.
It is the responsibility of the Co-Trustee to report income.*

Mortgage (must have agreements on file)/Rent: _____
Insurance (must have agreements on file): _____
Property Taxes (must have agreements on file): _____
Electric: _____
Gas/Heating Fuel: _____
Water/Sewer/Garbage: _____

OTHER (Receipts Attached) (Please List Below)

Descriptor	Vendor	Amount
_____	_____	_____
_____	_____	_____

TOTAL TO BE REIMBURSED:

\$ _____

Special Mailing Instructions: _____

*By signing as trustee, I hereby attest that this reimbursement form accurately reflects the amounts submitted for reimbursement. I do hereby attest that this information is true, accurate and complete to the best of my knowledge and I understand that falsification, omission, or concealment of this information may subject the beneficiary to loss of SSI/Medicaid.

DATE

SIGNATURE OF TRUSTEE

Address Changed: No Yes If Yes, Address: _____

Email: _____ Phone: _____