

IMPORTANT NOTICE

State/County Special Assistance Beneficiary Estate Subject to Medicaid Recovery Notice

YOUR ESTATE MAY BE SUBJECT TO MEDICAID ESTATE RECOVERY

You (your representative) applied for State/County Special Assistance (SA). Medicaid pays for **personal care services for certain qualified** Special Assistance beneficiaries. **Services that may be subject to recovery are stated in the N.C. Gen. Stat. sec 108A-70.5. Federal and State law require the Division of Medical Assistance to file a claim against the estate of certain individuals to recover the cost of these services.**

Medicaid cannot collect any assets that are not part of your estate at the time of your death. No lien will be placed on property as part of the Estate Recovery process.

Estate Recovery does not apply to everyone. A claim will be filed against the estate of a deceased individual who:

- Applied or reapplied for, or was receiving State County Special Assistance on, or after May 1, 2007

AND

- Was 55 years of age or older and
- Received In Home Care for Adults (IHCA), or In Home Care for Children (IHCC) on, or after May 1, 2007, and/or
- **Received Consolidated Personal Care Services paid for by Medicaid on or after January 1, 2013.**

There are some circumstances when Medicaid will not collect from your estate. Estate Recovery is waived when:

- You are survived by a spouse, child under 21, or a child of any age who became disabled or blind before age 21 and continues to live on your property, or
- The total assets in your estate are less than \$5,000, or the total amount Medicaid paid for In Home Care for Adults (IHCA), In Home Care for Children (IHCC) and/or **Consolidated Personal Care Services** is less than \$3,000, or
- Recovery will cause undue or substantial hardship to a surviving heir.

This notice is for informational purposes only. If you have any questions about this notice, contact your local county department of social services. Should you have further questions regarding Medicaid, or North Carolina Health Choice, you may call the Department of Health and Human Services (DHHS) Customer Support Center, toll free at 1-800-662-7030 (English/Spanish) or 1-877-452-2514 (Note: this is a TTY number that is for deaf or hearing impaired callers). The DHHS Customer Support Center is open from 8:00 a.m. until 5:00 p.m., Monday - Friday. Additional information about services in your community is also found on the DHHS website at <http://www.ncdhhs.gov/>.

Name of Applicant/Beneficiary

Applicant/Beneficiary/Representative Signature

Caseworker Signature

Date Signed

Representative Relationship to A/B

Representative Mailing Address

Daytime Phone No.