

FACT SHEET

Medicaid and Estate Recovery

Overview

Estate Recovery is the process to obtain reimbursement for claims paid by Medicaid from the estate of a deceased Medicaid member. The Estate Recovery statute has existed in Georgia since 1981. Only estates valued at \$25,000 or less are exempt from Estate Recovery.

States are required to have an Estate Recovery Program under the provisions of the Omnibus Budget Reconciliation Act of 1993.

Estate Recovery applies to Medicaid members who, at the time of their death:

- Were of any age, and an inpatient in a nursing facility or intermediate care facility for people with mental retardation, or in any other mental institution.
- Were 55 years of age or older when they received home- and community-based services instead of being cared for in an institution.

The Definition of “Estate”

For the purposes of Estate Recovery, the estate is defined as “all real and personal property” as defined in the probate code. The estate also includes real property passing by joint tenancy, right of survivorship, life estate, survivorship, trust, annuity, homestead or any other arrangement. The estate includes excess funds from a burial trust or contract, promissory notes, cash and personal property.

Notifying DCH about a Member’s Death

DCH must be notified in writing within 30 days of the death of the Medicaid member. The notice should be mailed to:

Georgia Department of Community Health
Estate Recovery Unit
Circle 75 Parkway, Suite 650
Atlanta, Georgia 30339



Hardship Criteria

The following criteria will be used to determine whether an undue hardship exists:

- The asset to be recovered is an income-producing farm of one or more of the heirs, and the annual gross income is \$25,000 or less; or
- The recovery of assets would result in the applicant becoming eligible for governmental public assistance based on need and/or medical assistance programs.



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NOTE: If the personal representative of an estate makes a distribution either in whole or in part of the property of an estate without having reimbursed the Medicaid agency, the personal representative may be held personally liable for the amount of the Estate Recovery claim.

Delayed Recovery

Recovery is delayed if:

- The deceased member's spouse is alive.
- The deceased member has a living child under the age of 21.
- The deceased member has a living child of any age who is blind or permanently and totally disabled pursuant to Title XIX of the Social Security Act.

For More Information

For additional information, contact the Medicaid Estate Recovery Unit at 770-916-0328 or visit the DCH website at <https://dch.georgia.gov/>. Members with questions about Medicaid Estate Recovery may submit them to GAEstateRecovery@dch.ga.gov, or write to Georgia Department of Community Health, Estate Recovery Unit, Circle 75 Parkway, Suite 650, Atlanta, GA 30339, or fax to 678-569-0066. For program information, please visit the following website: <http://hms.com/ga/medicaidrecovery/>