



Estate Recovery Changes IMAC

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IMAC Meeting - May 15, 2014



Why the changes?

- In the 2013-15 State Budget, also referred to as Act 20, changes were made to the Estate Recovery Program to ensure the long-term financial sustainability of the Medicaid program. Under Act 20, the Department was given the necessary tools to collect the health care costs that were funded by taxpayers from the estates of former Medicaid beneficiaries.
- In September 2013, the Wisconsin Legislature's Joint Committee on Finance approved the implementation of the most of the changes.
- On December 14, 2013, Wisconsin Act 92 modified the Estate Recovery Program provisions included in Act 20 to codify the action taken by the Joint Committee on Finance.



What is changing?

- Recovery from life estates
- Recovery from TEFRA Lien
- Recovery from the estate of surviving spouses
- Recovery from revocable trusts (living trusts)
- Recovery from life insurance policies
- Recovery of all services while participating in a long-term care program
- Capitation payments



Which members will be affected by these changes?

- Medicaid members of any age who live in nursing homes.
- Medicaid members of any age living in an inpatient hospital and are required to contribute to their cost of care.
- Medicaid members age 55 or older may have the cost recovered for only certain benefits received while they live in the community.
- Medicaid members age 55 or older who reside in the community and receive services through a home and community-based waiver program, or through the Program of All-Inclusive Care for the Elderly (PACE).



Who is affected? (cont.)

- Wisconsin Chronic Disease Program (WCDP) participants of any age for services that were provided on or after September 1, 1995.
- Community Options Program (COP) participants who are age 55 or older for services that were provided on or after January 1, 1996, and
- Non-Medicaid Family Care services provided on or after February 1, 2000, as reported to the Department for enrollees age 55 or older and living in the community; or that are any age and who live in an inpatient hospital and are required to contribute to their cost of care; or who live in a nursing home.



Notification to those affected

- Medicaid and WCDP members age 55 and older, and members who are considered institutionalized will be mailed a letter in late May/early June informing them of the changes effective **August 1, 2014.**
- The letter will be available on the Estate Recovery Program website at dhs.wisconsin.gov/medicaid/erp
- New members will be made aware of the program rules when they enroll in Medicaid and reach the age of 55 or become institutionalized members and will receive the Estate Recovery Program handbook.



How will this affect the consortiums?

- Once these notices are mailed to the members there may be an increase in call volume.
 - Each notice will direct the member to contact Member Services, who will then refer members to Estate Recovery for detailed questions.
 - The notice will state that contact should be made with ADRCs for benefit counseling and possible case closure by **July 18, 2014**. This will allow for case closure prior to August Adverse Action if members would like to opt out of Medicaid/WCDP services.



If calls are received with questions specifically relating to the policy changes in the Estate Recovery Program they should be directed to the Estate Recovery Section at (608) 264-6755 or (608) 267-7739.



CARES/CWW Changes

- There are no CARES/CWW updates.
- There are no new or changes to any CARES/CWW screens.



Communications Plan

- Letters are being sent to the affected members - Late May/Early June
- Creation of two Operations Memos – Late May
 - Policy
 - Implementation
- The Medicaid Eligibility Handbook will be updated
- Trainings
 - ADRC
 - June 10, 2014-Madison
 - June 12, 2014-Oconomowoc
 - June 16, 2014-Eau Claire
 - June 17, 2014-Wausau
 - June 18, 2014-Green Bay
 - June 24, 2014-Milwaukee
 - IMAC
 - June 2014



Questions/Concerns



Contact Information

Wisconsin Estate Recovery Program
(608) 264-6755 or (608) 264-7739

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