

REV - Medical Assistance Income Trust (Miller Trust)

Purpose:

To identify and obtain medical assistance income trust and special needs trust funds to reimburse the medical assistance debt.

Identification of Roles:

Administrative Assistant reviews referrals to identify Miller Trust funds and requests those funds through first, second, and third contact letter, or free form letter requesting the funds along with other assets.

Performance Standards:

- a. Provide monthly reports of ongoing cases and collections to the Department within ten business days of the end of the month.
- b. Notify the representative/attorney of the deceased of the obligation of the trust to relinquish funds in repayment of medical assistance payments within 10 business days of identification of the existence of a medical assistance income trust or a special needs trust.
- c. Provide an annual report with summary information for the most recent state fiscal year to the Department no later than August 15 of each contract year. The information in the annual report should include identifying information for all trusts acted on during the state fiscal year, the resolution of each trust case (such as closed with a collection, closed without a collection, still open), the money amount owed to Medicaid and the money amount (if any) that was collected.

Path of Business Procedure:

Step 1: Referral is received, entered on the database and reviewed by Administrative assistant for a Miller trust or Special Needs Trust (see Intake of Referrals Manual)

Step 2: Medical Assistance Debt Response Forms are reviewed for a Miller Trust or Special Needs Trust (see Review of Medical Assistance Debt Response Forms)

Step 3: Funds are requested by Administrative Assistant, Program Assistant, Operations Manager, or Director, depending on complexity of rest of case. An Initial Contact Letter may be used in simple cases, but in more difficult cases a personal letter will be written.

Step 4: Funds are deposited by Program Assistant (see Check Handling Manual)

Forms/Reports:

Deposit reports, monthly and annual reports reflect Miller Trust and Special Needs Trust recoveries

RFP References:

6.8.4

Interfaces:

N/A

Attachments:

N/A