

CHANGE NOTICE FOR MANUAL NO. 08-23

DATE: May 22, 2023

Manual: Aged, Blind, and Disabled Medicaid

Change No: 08-23

To: County Directors of Social Services

I. BACKGROUND AND CONTENT OF CHANGE

The Division of Health Benefits (DHB) has updated policy section [MA-2285, Estate Recovery](#). This section provides guidance for caseworkers regarding mandated estate recovery procedures that are in place to facilitate recovery for certain Medicaid payments from the estates of deceased Medicaid beneficiaries.

II. POLICY UPDATE

A. MA-2285

1. General Updates
 - a. All sections have been reformatted and reorganized.
 - b. Language has been updated throughout and legacy language has been removed (i.e., EIS procedures have been updated to NC FAST procedures).
 - c. Hyperlinks to DHB forms and policy sections have been updated where necessary.
2. MA-2285 Policy Updates
 - a. Section III., Estate Recovery Procedures at Application and Recertification has been updated.
 - b. Sections V.A. and V.F. have been updated to include assets and expense increased maximum amounts. These amounts are used by the third-party recovery unit to determine if estate recovery should be waived.

B. Forms

1. The following forms have been updated from DMA to DHB. The forms have also been updated with the maximum assets and medical expense amounts.
 - [DHB-5051/DHB-5051sp](#), Notice: Your Estate may be Subject to Medicaid Recovery: Individuals Under Age 55
 - [DHB-5052/DHB-5052sp](#), Notice: Your Estate is Subject to Medicaid Recovery
 - [DHB-5052SA/DHB-5052SA-sp](#), State/County Special Assistance Notice: Your Estate may be Subject to Medicaid Recovery
 - [DHB-5053/DHB-5053sp](#), Permanently Institutionalized Notice: Your Estate is Subject to Medicaid Recovery
 - [DHB-5054/DHB-5054sp](#), Medicaid Estate Recovery Claim
 - [DHB-5056](#), Estate Recovery Information Form
2. Signature lines have been removed from all Medicaid Estate Recovery forms. The a/b is **not** required to sign any Medicaid Estate Recovery form.

III. EFFECTIVE DATE AND IMPLEMENTATION

This policy is effective upon receipt. The new asset and expense maximums are effective beginning January 1, 2023.

If you have any questions regarding information in this letter, please contact your [Operational Support Team Representative](#).

DocuSigned by:

Jay Ludlam

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Deputy Secretary, NC Medicaid