

**IMPORTANT NOTICE REGARDING THE
MEDI-CAL ESTATE RECOVERY PROGRAM**

When a Medi-Cal beneficiary is 55 years of age or older at the time of death, the State will collect from his/her estate the cost of Medi-Cal services received, including insurance premiums paid and payments made to managed care plans, ON or AFTER his/her 55th birthday.*

Estate is defined as any real or personal property owned by the Medi-Cal beneficiary, including any assets distributed through joint tenancy, tenancy in common, survivorship, life estate, and living trust. The Department of Health Care Services (Department) may also claim against a life insurance policy or retirement account that names the estate as the beneficiary or that goes back to the estate. Annuities purchased on or after September 1, 2004 may also be recovered. The Department will never collect more than either the value of the estate property owned by the Medi-Cal beneficiary or the amount of the medical services he/she received, whichever is less.

The Department is not allowed to pursue repayment if:

The deceased Medi-Cal beneficiary was married and his or her husband/wife is still living. However, the Department can seek repayment upon the death of the spouse;

A child under the age of 21 survives the Medi-Cal beneficiary; or,

A child of any age who is blind or disabled (as defined by the federal Social Security Act) survives the Medi-Cal beneficiary.

When a Medi-Cal beneficiary dies, the person handling the estate must give written notice of the death, within 90 days of the date of death, to the Director of the Department. Notice must also be given to the Department when the surviving husband/wife dies. The notice and a copy of the death certificate must be mailed to: Department of Health Care Services, Recovery Branch, MS 4720, P.O. Box 997425, Sacramento, CA 95899-7425. A phone call or written notice to any other governmental agency does not satisfy this requirement.

For further information regarding the Estate Recovery program only, call (916) 323-4836 or seek legal advice. Estate Recovery staff will not provide legal advice. For additional information, you may also visit the Department's website at <http://www.dhcs.ca.gov/services/Pages/ThirdPartyLiability.aspx>.

*The State may also collect if an individual was under the age of 55 at the time of death, and had been an inpatient in a nursing facility, intermediate care facility for the mentally retarded, or other medical institution.

*** * * Please Share this Notice with Family Members * * ***