

Medicaid Estate Recovery



Recovering payments from the estates of Medicaid recipients is a complex, multi-layered process that requires knowledge, skill, and sensitivity. It is also a practice that can be time consuming, labor intensive, and costly. Evolving regulations set against heightened demand for equity, integrity, and cost control mean that state Medicaid programs are increasingly difficult to manage. This is especially true at a time when interest in Medicaid expansion competes with tighter budgets, lower revenues, and ramping fraud, waste, and abuse. We know that the stringent standards governing these programs can create uncertainty in determining the way forward, particularly for new or underdeveloped programs, such as Medicaid estate recovery (ER).

That's why you need a partner with the people, insight, and capabilities to help you steer a path through the challenges. Myers and Stauffer understands the intricacies of operating a state's Medicaid agency and dealing with regulatory authorities charged with program oversight. Our more than 44 years of health care and human services experience and our national presence as a contractor for state and federal governmental programs puts us directly at the forefront of regulations as they are considered, proposed, and finalized.

We know health care. We know Medicaid.

We are consultants with expertise. We are skilled, credentialed experts – certified public accountants (CPAs), certified fraud examiners (CFEs), and more – which means our teams must meet the highest standards for independence and quality. We are problem solvers with a precise blend of regulatory knowledge, Medicaid experience, and technical excellence – along with a constellation of value-added competencies that clients are unlikely to find elsewhere.

Managing your ER program is no simple mandate.

What it is

To meet Medicaid's mission of providing a health care safety net for the nation's most vulnerable populations, states are federally mandated to recover allowable expenses paid on behalf of certain beneficiaries receiving Medicaid benefits from their estates. These efforts not only provide a cost-effective way to offset state and federal expenditures, but also shift some of the burden of paying for benefits away from the taxpayer by allowing states to spend their share of recovered funds to preserve and/or expand services for beneficiaries.

Why It Matters

ER serves as a source of revenue for states, but also opens questions about fairness, equity, and access.¹ While states are required to provide Medicaid, delivering these benefits is expensive, and all funds spent in one place mean less funding elsewhere.² Ultimately, it requires significant time and expense to pursue ER. Although an actual source of revenue, its cost also means that ER is at odds with Medicaid expansion – rejected by many states that deemed it an additional expense.³ Moreover, beneficiary advocates have expressed growing concern that ER programs contribute to social inequities, treat heirs inconsistently, recoup little compared to overall benefit spending, and even deter some individuals from seeking services offered through the Medicaid program.

Reconciling these issues is imperative for state Medicaid agencies charged with the weighty responsibility of pursuing ER. Together, these things represent urgent philosophical and tactical challenges that require skilled and strategic responses from the right partner.

Why Myers and Stauffer: Skilled People, Exceptional Experience, Robust Capabilities

Myers and Stauffer works with government agencies in support of their missions, offering strategic planning, program design, procurement, policy analysis and development, facilitation, evaluation, rate and payment methodology support, health IT design and advancement, and cost containment analysis, in addition to support services for nearly every administrative and operational component required of public health care agencies. Our services range from small-scale policy analysis to large-scale program operations. We offer innovative solutions designed to promote the quality, efficiency, and delivery of care, leading to better health outcomes and reductions in costs. Backed by disciplined professionals who work hard to meet the highest ethical and compliance standards, we have solid working relationships with our clients, built on foundations of trust we continually strive to earn.

¹ <https://www.macpac.gov/publication/updates-on-medicaid-estate-recovery-analyses/>.

² <https://obamacarefacts.com/medicaid-estate-recovery-facts-and-myths/>.

³ <https://obamacarefacts.com/medicaid-estate-recovery-facts-and-myths/>.

The Right People...

Our people serve as the cornerstone of our strategic approach to any project. The Myers and Stauffer Team offers an exceptionally qualified, experienced, and diverse consulting team that combines state-specific experience with national-level expertise in Medicaid managed care programs. Our skilled professionals include former Medicaid directors, past employees of the Centers for Medicare & Medicaid Services and state government, certified professional coders, health care policy experts, health information specialists, registered pharmacists, clinicians, licensed social workers, statistical consultants, academic researchers, medical doctors, registered nurses, health care attorneys, CPAs and CFEs, and more.

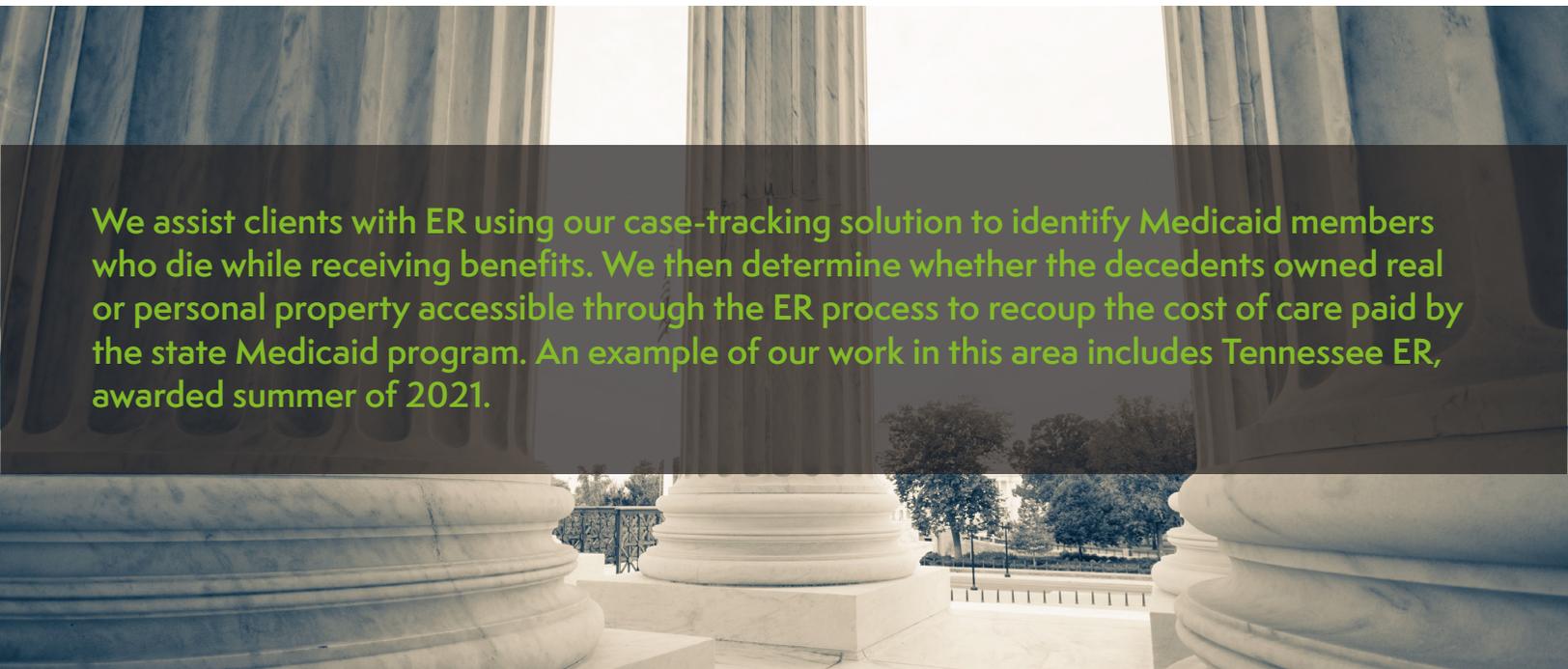
...With the Right Experience

Our teams have provided consulting, regulatory compliance and operational support expertise to state Medicaid and public health care agencies for more than 44 years. During this time, our work has touched on virtually every aspect of government-sponsored health care. This provides us the skills needed to quickly learn, develop, implement, and maintain the requirements of your ER initiatives.

Nationally recognized as experts in the area of health care delivery system design, audit, compliance, and consulting, we currently service health care and human service agencies in 49 states, experience that continues to shape our work. Our extensive exposure to state Medicaid programs enables us to draw upon our national experience and quickly identify and discuss national best practices while addressing individual state requirements.

The Right Capabilities

Myers and Stauffer specializes in the consulting, program integrity, and operational support services critical to state Medicaid agencies and their ER programs. We focus on protecting the integrity of health and human service benefit payments, processes, and systems. We base our offerings on three responsibility areas: improving the quality and efficiency of health care; preventing fraud, waste, and abuse; and recovering inappropriately made payments. Our approach to processing ER cases includes: creation and maintenance of case files; communicating with estate representatives; obtaining itemized Medicaid charges; releasing and referring claims; checking for open probate case; conducting asset and title searches; filing and referring claims; and reviewing payment deposits.



We assist clients with ER using our case-tracking solution to identify Medicaid members who die while receiving benefits. We then determine whether the decedents owned real or personal property accessible through the ER process to recoup the cost of care paid by the state Medicaid program. An example of our work in this area includes Tennessee ER, awarded summer of 2021.

The Right Partner

Myers and Stauffer is one of the few firms in the country whose focus is on behalf of government agencies to ensure they spend public funds in compliance with state and federal laws and regulations. We offer a full complement of services designed to assist our state and federal clients in succeeding with every aspect of their operations. Here are just a few reasons why we are the right partner:



National Presence.

Myers and Stauffer is a CPA and consulting firm with offices in 20 states. We have nearly 900 professionals, including 33 members or principals, all of whom engage full time to our state and federal partners.



Knowledge of Medicaid Operations.

More than four decades of supporting state Medicaid programs have afforded us knowledge that comes only through direct, hands-on experience. Our experience in providing assurance and consulting services to these clients, the Centers for Medicare and Medicaid Services, and the Department of Justice is exceptional in the industry.



Support of Innovation.

We work with our clients to take a fresh look at how they administer their ER programs. It is not our intent to conduct business as usual – if we see opportunities for improvements, we are committed to accomplishing these in partnership with our state clients.



Stringent Standards, No Conflicts.

Unlike most firms in our industry, we intentionally restrict our practice to government-sponsored health care and human service programs. We do not accept providers, health plans, or individuals as clients. By virtue of our CPA firm model, we avoid any engagements that could create any real or perceived conflict of interest. We also conduct ourselves according to rigorous professional ethical standards designed to serve the public good. This is a hallmark of professional CPA standards, and it makes us unique within our business community.

If you are interested in more information on estate recovery services and how Myers and Stauffer can help you, please contact us.

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