

LDSS-4454EL

LDSS QUARTERLY ESTATE AND CASUALTY RECOVERY REPORT

DISTRICT IDENTIFICATION

District Name _____ District Code _____

Report Quarter/Year _____

A. ESTATE RECOVERIES

- 1. Number of death investigations started this quarter _____
- 2. Number of deaths investigated that resulted in claims _____
- 3. Number of estate recoveries realized during report quarter _____
- 4. Total amount of medical assistance recovered for estates in A.3. \$ _____
 - 4a. Amount of medical assistance recovered from probate assets \$ _____
 - 4b. Amount of medical assistance recovered from non probate assets \$ _____

B. CASUALTY RECOVERIES

- 1. Number of casualty investigations started this quarter _____
- 2. Number of accidents investigated that resulted in liens _____
- 3. Number of accident recoveries realized during report quarter _____
- 4. Amount of medical assistance recovered from casualty cases in B.3. \$ _____

Please submit reports to: Third Party Liability
New York State Department of Health
Office of Health Insurance Programs
One Commerce Plaza, Suite 826
Albany, New York 12210

OR

E-Mail: tpl@health.state.ny.us
(Please indicate in subject line: Quarterly Estate Report)

INSTRUCTIONS: The following are instructions for completion of the “LDSS Quarterly Estate and Casualty Recovery Report.”

DISTRICT IDENTIFICATION

Complete each line as specified with your District's name and code, and the quarter/year for which activity is being reported.

A. ESTATE RECOVERIES

1. Enter number of deaths for which estate recovery activity was initiated during this quarter (i.e. deaths for recipients over age 55 or permanently institutionalized).
2. Enter number of estate claims actually made in this quarter.
3. Enter number of estate cases that resulted in recoveries realized during this quarter.
4. Enter total dollar amount of Medicaid expenditures recovered this quarter as a result of estate recovery activity. Include amounts recovered from estate claims, satisfaction of assignments of proceeds after the recipients' deaths, life insurance payments, PNAs from nursing homes, etc.
The total dollar amount is separated by including amounts recovered from probate assets on line 4.a and amounts recovered from non probate assets on line 4.b.

B. CASUALTY RECOVERIES

1. Enter number of incidents for which casualty recovery activity was initiated during the quarter.
2. Enter number of casualty liens actually filed in this quarter.
3. Enter number of casualty cases that resulted in recoveries realized in this quarter.
4. Enter total dollar amount of Medicaid expenditures recovered as a result of casualty recovery activity this quarter.