

Special Needs Trust Recovery Services

Maximum recoveries. Maximum compliance.

Your program could be leaving huge amounts of cash on the table every year by not effectively recovering from special needs trusts.

Special needs trust legislation was enacted in 1993, allowing money to be held in a special needs trust without affecting the beneficiary's Medicaid eligibility if certain specific requirements are met.

The state should receive funds remaining in any special needs trust at the death of the trust beneficiary – the special needs trust “payback” requirement. Too often, trusts are unreported and the owed funds are unrecovered and lost to your agency.

At HMS, we can provide an estimate of the number of special needs trusts established per year in your state, as well as an overview of our streamlined and standardized trust document review process and trust accounting review process.

HMS Special Needs Trust Recovery Services ensure:

- Identification and cataloging of special needs trusts in your state for past, present, and future
- Creation and maintenance of complete and accurate records of special needs trusts in your state, including trust inventories

- Compliance with CMS state program requirements
- Maximization of payback recoveries for fee-for-service payments and managed care organization capitated payments
- Maximization of subrogation pre-trust third party liability lien recoveries



Through HMS Trust Recovery Services you will achieve:

- Legally compliant, newly established trusts
- Responsible trust usage
- Maximization of medical expense reimbursement upon the death of trust beneficiaries.

Is it worth it? One state realized a return on investment of 342%.

Contact us today to learn more about Special Needs Trust Recovery Services.

hms.com



Enterprising healthcare

HMS provides the broadest range of cost containment solutions in healthcare to help payers improve performance. Using innovative and time-tested technology and analytics, we prevent and recover improper payments related to fraud, waste, and abuse. As a result of our services, customers recoup billions of dollars every year and save billions more through the prevention of erroneous payments.