

Slide 1

**Achieving Compliance:
Taking Medicaid & Medicare's
Interests Into Account**

Florida State Ass of Rehabilitation Nurses
36th Annual Educational Conference
Orlando, Florida
May 9, 2012



Slide 2

2013 NIMME Conferences



 New Orleans Feb 25-26	 San Diego Apr 8-9	 Boston June 24-25	 Chicago Sep 9-10
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Slide 3

Learning Objectives

- Appreciate differences between Supplemental Security Income and Disability Insurance Benefits.
- Become aware of differences between Medicaid and Medicare eligibility, coverage, and benefits.
- Learn how to protect eligibility for SSI and Medicaid despite receipt of judgment or settlement award.
- Understand when to consider Medicare's interests.
- Know how to appropriately take Medicare's past and future interests into account when settling a work comp, auto, or liability matter.

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Slide 4

The Problem

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The Global Leader in Compliance

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Supplemental Security Income

8 Million Americans
Receiving SSI
Totaling \$54 Billion

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Slide 6

Medicaid

58 Million Americans
Receiving Medicaid
Totaling \$466 Billion

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Slide 7

Old Age Insurance Benefits

38 Million Americans
Receiving Old Age Benefits
Totaling \$462 billion

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Slide 8

Survivors Insurance Benefits

7 Million Americans
Receiving Survivors Benefits
Totaling \$84 Billion

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Slide 9

Disability Insurance Benefits

**11 Million Americans
Receiving Disability Benefits
Totaling \$120 Billion**

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Slide 10

Medicare

**48 Million Americans
Receiving Medicare
Totaling \$523 Billion**

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Slide 13

Supplemental Security Income

Aged or Disabled

Limited Income

Limited Resources

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Slide 14

Medicaid

Federally Funded, State Run

Aged or Disabled

Limited Income/Resources

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Slide 15

Special Needs Trusts

Irrevocable Trusts

For Disabled's Benefit Only

Penalty Period

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Slide 16

Types of Special Needs Trusts

Third Party Special Needs Trust

Disability Special Needs Trust

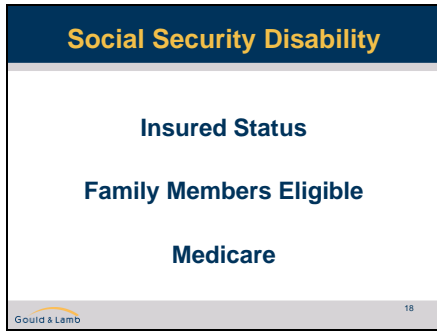
Pooled Special Needs Trust

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Slide 17



Slide 18



Slide 19

Medicare Secondary Payer Act

Primary Payer Always Responsible

Medicare is Secondary Payer

Must Always Take Medicare's Interests Into Account

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Slide 20

Taking Medicare's Interests Into Account

Mandatory Insurer Reporting

Conditional Payment Resolution

Medicare Set Asides Allocations, Approvals, and Administration

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Slide 25

Conditional Payment Resolution

Lien from DOA to DOS

Primary Payer Responsibility

CP Requests/Final Demand

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Slide 26

Medicare Set Asides

Current Medicare Beneficiaries

Eligible Within 30 Months of DOS

No Reasonable Anticipation

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Slide 27

MSA Process

Allocation

Approval

Administration

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Slide 28

MSA Allocation

Future Medical Needs

Appropriate Fee Schedule

Life Expectancy

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Slide 29

MSA Approval

CMS Regional Offices

MSA Allocation

Medical/Legal Documentation

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MSA Administration

Self Administration

Self Administration Support

Professional Administration

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Slide 31

G&L Services

- www.gouldandlamb.com
 - Mandatory Insurer Compliance Services
 - Conditional Payment Resolution Services
 - Medicare Set Aside Allocation Services
 - Future Medical Costs Projection Services
 - Post Settlement Account Administration
 - Life Care Planning Services
 - Medical Case Management Services
 - Prescription Drug Services

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Slide 32

G&L Tools

- www.gouldandlamb.com
 - GL-Medicare Risk Assessment
 - GL-Search
 - GL-Code
 - GL-Professional Administration Quote
 - GL-Resources & Forms
 - GL-Industry News Bulletin
 - www.themedicarecomplianceblog.com

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Slide 33

Social Media

- LinkedIn
 - Medicare and Medicaid Compliance Group
 - Florida Workers' Compensation Group
 - Social Security Benefits Group
 - Hispanic Issues and Demographics Group
 - MSA and SNT Administration Group (soon)
- Twitter
- Facebook

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Slide 34

Thank You!

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Gould & Lamb 34
