

**Application for Long Term Care or Related Medical Assistance**

**Instructions to the Person Applying for Assistance**

Please read all questions carefully before filling out this form and any attached supplements. This information will be used in determining your eligibility and need for assistance. All questions on the form must be completed. If you need help completing or understanding this form, contact the Department of Social Service in the county where you live. The form and attachments, when completed and signed by the applicant or authorized representative and witnessed as indicated, should be returned to your local Social Service Office. **All information must be verified. Please attach copies of all verifications.**

**For Office Use Only**

**Case Number Assigned**

**ID# Assigned**

**Date received in local office:**

**This application is for:** Long Term Care \_\_\_\_\_ Assisted Living \_\_\_\_\_  
 Adult Foster Care \_\_\_\_\_ Other \_\_\_\_\_

**Facility Name:** \_\_\_\_\_

**1. Personal Information** (Please Print)

A. Your Name: \_\_\_\_\_  
 (First) (Middle) (Last)

B. Current Address: \_\_\_\_\_  
 (Nursing Home, Hospital, etc.) (Street) (City) (Zip) (County)

Home Address: \_\_\_\_\_  
 (Street) (City) (Zip) (County)

Home Telephone Number ( \_\_\_\_\_ ) \_\_\_\_\_-\_\_\_\_\_

C. Race (can check more than one)  
 White  
 American Indian  
 Black  
 Hawaiian  
 Asian

D. Ethnicity  
 Also check here if Hispanic

E. Sex  
 Male   
 Female

F. Current Marital Status  
 Married  Divorced  
 Single  Widowed

G. Birth Date  
 \_\_\_\_\_  
 Month Day Year

H. Social Security Number  
 \_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_

I. Date of your most recent admission to a hospital. (Only if within the past 6 months) Month _____ Day _____ Year _____		J. Date of most recent admission to a medical facility or nursing home. Month _____ Day _____ Year _____	
K. How many months have you or someone else paid private rate for your continuous care in any facility? _____ months			
L. Are you a United States citizen? Yes ( ) No ( )  If no, please provide proof of immigration status.			
M. Are you a resident of South Dakota? Yes ( ) No ( ) Have you applied for or received assistance from South Dakota in the past? Yes ( ) No ( ) If yes, in what county? _____.			
N. Medicare Claim Number		O. Civil Service Annuity #	P. Railroad Retirement #
Q. Veterans Benefit Number		R. Do you have Medicare Part A? Yes ( ) No ( ) Part B? Yes ( ) No ( ) Part D? Yes ( ) No ( ) Part D Plan: _____	
* Completion of social security numbers (SSN) is optional for persons not requesting assistance.			
2. <b>Spouse</b> (If ever married, please answer the questions)		B. Birth Date	
A. Full Name of Spouse		_____ / _____ / _____ Month Day Year	
Address of Spouse		C. If deceased, date of death	
_____		_____ / _____ / _____ Month Day Year	
_____		D. If divorced, date of divorce	
_____		_____ / _____ / _____ Month Day Year	
E. Social Security Number		F. Medicare Claim Number	G. Civil Service Annuity No.
H. Railroad Retirement Number		I. Are you or was your spouse a Veteran?  Yes ( ) No ( )	J. Veterans Benefit Number



<p>B. Do you have any unpaid medical bills from the past three months?</p> <p>( ) Hospital                      ( ) Dr Visit</p> <p>( ) Pharmacy                      ( ) Other</p> <p>Names &amp; addresses of facility:</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>C. Are you requesting assistance for any of the last three months? Yes ( ) No ( )</p> <p>If yes, for what months?</p> <p>_____</p> <p>D. If requesting because of alleged disability, name disability and amount of time disability is expected to last.</p> <p>_____</p>
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**6. Legal Guardian/Power of Attorney**

Do you have a legal (court-appointed) guardian?    Yes ( )    No ( )

Do you have a Power of Attorney? Yes ( )    No ( )

Name and address of this person \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Telephone number \_\_\_\_\_

Date of guardianship or Power of Attorney (Month & Year) \_\_\_\_\_

**Please provide a copy of document unless previously provided.**

**7. Is Another Person Completing This Form?**

If you are completing this form for another person give:

Your Full Name (Print) \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Telephone ( \_\_\_\_\_ ) \_\_\_\_\_

Your Title or Relationship to Applicant ( ) Family \_\_\_\_\_

( ) Social Worker    ( ) Case Worker    ( ) Other \_\_\_\_\_

Name & address of applicant's relative or friend who may be contacted for information:

\_\_\_\_\_

**8. Name of Facility Social Worker**

If you live in a facility, please provide the name of the Facility Social Worker:

**9. Resources/Assets** Complete questions below for yourself and your spouse.  
(Include all your resources/assets, and those owned by your spouse or owned jointly with anyone.)

**(NOTE: YOU ARE REQUIRED TO VERIFY ALL OF THE FOLLOWING INFORMATION)**

**A. Cash on hand, savings at home, or money held by friends/relatives** Yes ( ) No ( )

Description:	Owner(s):	Value: \$
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**B. Do you have money in a nursing home account?** Yes ( ) No ( )

Current Balance:

**C. Do you or your spouse have checking accounts, money market accounts, employee payroll debit card(s), or Direct Express (Federal Benefits) card(s)?** Yes ( ) No ( )

Bank Name & Address:	Owner(s):	Current Balance:	Account Number:
		\$	1.
		\$	2.
		\$	3.
		\$	4.

**NOTE:** You are required to attach copies of your most recent bank statements.

**D. Do you or your spouse have savings accounts?** Yes ( ) No ( )

Bank Name & Address:	Owner(s):	Balance:	Account #:
		\$	1.
		\$	2.
		\$	3.
		\$	4.

**E. Do you or your spouse have health savings accounts established through a bank, credit union, insurance company or employer ?** Yes ( ) No ( )

Describe:	Owner(s):	Total Value:	Name & Address of Institution
		\$	
		\$	

<b>F. Do you or your spouse have certificates of deposit?</b> Yes ( ) No ( )			
When is interest paid? <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-Annually <input type="checkbox"/> Annually			
Bank Name & Address:	Owner(s):	Current Value: \$ \$ \$	Certificate #: 1. 2. 3.
<b>G. Do you or your spouse own U.S. Savings Bonds?</b> Yes ( ) No ( )			
Description:	Owner(s):	Total Value:	Series#    Purch. Date: ____    _____ ____    _____ ____    _____ ____    _____
<b>H. Do you or your spouse have funds such as Keogh, 401K's or IRA's?</b> Yes ( ) No ( )			
Describe:	Owner(s):	Total Value: \$ \$ \$	Name & Address of Institution
<b>I. Do you or your spouse have funds in an annuity or any similar plan or legal instrument?</b> Yes ( ) No ( ) (Please read annuity disclosure information and information concerning when the State shall be named beneficiary of an annuity provided on page 14.)			
Describe:	Owner(s):	Total Value: \$	Purchase Date:
<b>J. Have you or your spouse ever been named in any trust?</b> Yes ( ) No ( )			
Describe:	Owner(s):	Total Value: \$	Trustee Name:
<b>K. Do you or your spouse have municipal/corporate/government bonds?</b> Yes ( ) No ( )			
Describe:	Owner(s):	Total Value: \$	Name & Address of Institution
<b>L. Do you or your spouse have stocks or mutual funds?</b> Yes ( ) No ( )			
Describe:	Owner(s):	Total Value: \$	Name & Address of Institution

<b>M. Do you or your spouse have a safety deposit box?</b> Yes ( ) No ( )			
Location:	Owner(s):	List Contents:	
<b>N. Do you or your spouse own a home?</b> Yes ( ) No ( )			
Location:	Owner(s):	Who lives in the home? _____	
		Amount owed on home? \$ _____	
<b>O. Do you or your spouse own real property (land, city lots, etc.)?</b> Yes ( ) No ( )			
Is this property rented? Yes ( ) No ( )	Owner(s):	Value: \$	County Located:
<b>P. Do you or your spouse own any buildings or property rights (including mineral or timber rights)?</b> Yes ( ) No ( )			
Where? (County & State)	Owner(s):	Value: \$	Description:
<b>Q. Do you or your spouse retain a life estate in any property?</b> Yes ( ) No ( )			
Owner(s) of property	County Location:	Property Value: \$	Legal Description:
<b>R. Do you or your spouse have real property held in trust by the U.S. Government (ie: lease land)?</b> Yes ( ) No ( )			
Tribes of Enrollment:	Enrollment Number:	Yearly Lease Income: \$	IIM Account No.:
County:			
<b>S. Do you or your spouse own business equipment, machinery, livestock, antiques, or collections other than household furnishings?</b> Yes ( ) No ( )			
Please List _____ _____ _____ _____ _____ _____			Value: \$ \$ \$ \$ \$ \$

**T. Have you or your spouse sold property on a contract for deed?** Yes ( ) No ( )

Balance Due on Contract:  \$ _____	Owner(s) of property:	Description of Property:
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**U. Do you or your spouse have ownership in licensed or unlicensed cars, trucks, motorcycles, boats, recreational vehicles (camper, snowmobile), or any other vehicle?**  
Yes ( ) No ( ) If yes, complete below.

Owner's First and Last Name:	Co-owner's First and Last Name:	Amount Owed:
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Year, Type, Make and Model of Vehicle:	Primary Use of Vehicle:	Value:  \$
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Owner's First and Last Name:	Co-owner's First and Last Name:	Amount Owed:
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Year, Type, Make and Model of Vehicle:	Primary Use of Vehicle:	Value:  \$
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**V. Do you or your spouse have life insurance policies?** Yes ( ) No ( )  
If yes, list all policies:

Policy No.	Name of Company	Address	Policy Owner	Face Value	Cash Value

**W. Do you or your spouse have any financial arrangements such as contracts, insurance, or accounts designated for burial?** Yes ( ) No ( ) **If yes, list below.**

<u>Applicant</u>	<u>Spouse</u>
Where? _____ _____	Where? _____ _____
Face Value _____	Face Value _____
Does the interest stay in this account? Yes ( ) No ( ) If no, is the interest paid to you? Yes ( ) No ( )	Does the interest stay in this account? Yes ( ) No ( ) If no, is the interest paid to you? Yes ( ) No ( )

**10. Property/Assets In Trust Or Transferred**

**A. In the last 60 months (5 years) have you, your spouse, or anyone on behalf of you or your spouse, transferred, given away, gifted, loaned, or deeded sole or joint ownership in anything of value, such as money, land, buildings, etc.?**

Yes ( ) No ( ) If yes, complete below.

1. Item transferred, given away, gifted, loaned, or deeded: \_\_\_\_\_  
Date of transactions(s): Month \_\_\_\_\_ Year \_\_\_\_\_  
Cash Value at time of transfer: \$ \_\_\_\_\_  
What did you receive in return: \_\_\_\_\_

2. Item transferred, given away, gifted, loaned, or deeded: \_\_\_\_\_  
Date of transactions(s): Month \_\_\_\_\_ Year \_\_\_\_\_  
Cash Value at time of transfer: \$ \_\_\_\_\_  
What did you receive in return: \_\_\_\_\_

3. Item transferred, given away, gifted, loaned, or deeded: \_\_\_\_\_  
Date of transactions(s): Month \_\_\_\_\_ Year \_\_\_\_\_  
Cash Value at time of transfer: \$ \_\_\_\_\_  
What did you receive in return: \_\_\_\_\_

**B. In the last 60 months have you, your spouse, or anyone established a joint ownership in any real property owned by either you or your spouse? Yes ( ) No ( ) If yes, complete below.**

1. Date of Joint Ownership: \_\_\_\_\_ Type of property: \_\_\_\_\_  
Name of Joint Owner: \_\_\_\_\_ Address of Joint Owner: \_\_\_\_\_

2. Date of Joint Ownership: \_\_\_\_\_ Type of property: \_\_\_\_\_  
Name of Joint Owner: \_\_\_\_\_ Address of Joint Owner: \_\_\_\_\_

**C. In the last 60 months has a joint owner taken possession of their share in any of your or your spouse's asset such as money, savings accounts, checking accounts, certificates of deposits, bonds, stocks, or anything else of value? Yes ( ) No ( ) If yes, complete below.**

1. Date joint owner took possession of their share: Month \_\_\_\_ Day \_\_\_\_ Year \_\_\_\_  
List the type of asset: \_\_\_\_\_  
Name of joint owner: \_\_\_\_\_ Address of joint owner: \_\_\_\_\_

2. Date joint owner took possession of their share: Month \_\_\_\_ Day \_\_\_\_ Year \_\_\_\_  
List the type of asset: \_\_\_\_\_  
Name of joint owner: \_\_\_\_\_ Address of joint owner: \_\_\_\_\_

**D. In the last 60 months were any of your or your spouse's funds or property placed in trust for you, your spouse, or anyone else?** Yes ( ) No ( )  
 If yes, complete below.

1. Date Established: \_\_\_\_\_ Value: \_\_\_\_\_  
 Name of Trustee: \_\_\_\_\_  
 Address of Trustee: \_\_\_\_\_

2. Date Established: \_\_\_\_\_ Value: \_\_\_\_\_  
 Name of Trustee: \_\_\_\_\_  
 Address of Trustee: \_\_\_\_\_

**E. In the last 60 months has any payment from a trust (either income or principal) become unavailable to you or your spouse?** Yes ( ) No ( )  
 If yes, complete the following:

Date payment stopped or ceased to be available: Month \_\_\_\_ Day \_\_\_\_ Year \_\_\_\_  
 Name of Trustee: \_\_\_\_\_  
 Address of Trustee: \_\_\_\_\_

**F. Is any of your income paid directly into a trust?** Yes ( ) No ( )  
 If yes, complete below:

Date trust was established. Month \_\_\_\_ Day \_\_\_\_ Year \_\_\_\_  
 Name of Trustee: \_\_\_\_\_  
 Address of Trustee: \_\_\_\_\_

**11. Health Insurance/Long Term Care Insurance**

**A. Do you or your spouse have any health insurance coverage?** Yes ( ) No ( )  
 If yes, complete below for each person insured.

Insurance Company Name & Add.	Policy Number	Type of Coverage	Premium Amount
_____ _____	_____	<input type="checkbox"/> Inpatient Hospital <input type="checkbox"/> Outpatient <input type="checkbox"/> Dental <input type="checkbox"/> Cancer <input type="checkbox"/> Medicare Supplement <input type="checkbox"/> Other (i.e. prescriptions, Workman's Comp.)	Paid: \$ _____ <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-Annually <input type="checkbox"/> Annually
Name of Insured _____	Group Number _____		Employer Name (if group insurance) _____
Policy Holder Name _____	Policy Began ____/____/____		

Insurance Company Name & Add. _____ _____	Policy Number _____	Type of Coverage <input type="checkbox"/> Inpatient Hospital <input type="checkbox"/> Outpatient <input type="checkbox"/> Dental <input type="checkbox"/> Cancer <input type="checkbox"/> Medicare Supplement <input type="checkbox"/> Other (i.e. prescriptions, Workman's Comp.)	Premium Amount Paid: \$ _____ <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-Annually <input type="checkbox"/> Annually Employer Name (if group insurance) _____
Name of Insured _____	Group Number _____		
Policy Holder Name _____	Policy Began ____/____/____		

**B. Do you or your spouse have any Long Term Care Insurance?** Yes ( ) No ( )  
If yes, complete below for each person insured.

Insurance Company Name & Add. _____ _____ _____	Policy # _____ _____	Person Insured	Premium Amount Paid: \$ _____ <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-Annually <input type="checkbox"/> Annually
	Partnership Plan? Yes ( ) No ( )		

Insurance Company Name & Add. _____ _____ _____	Policy # _____ _____	Person Insured	Premium Amount Paid: \$ _____ <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-Annually <input type="checkbox"/> Annually
	Partnership Plan? Yes ( ) No ( )		

**12. Income** (List all income and benefits that you or your spouse receive from any source.)

***Please provide proof of all income received.***		Direct Deposit	List amount of income. If not received monthly, indicate how often.	
			You	Your Spouse
A. Social Security Check	Yes ( ) No ( )	<b>X</b>		
B. SSI (Supplemental Security Income)	Yes ( ) No ( )			
C. Veterans Benefits	Yes ( ) No ( )			
D. Veterans Compensation	Yes ( ) No ( )			

E. Railroad Retirement	Yes ( ) No ( )			
F. Civil Service Annuity	Yes ( ) No ( )			
G. Other Pension If yes, list name, address, & acct #	Yes ( ) No ( )			
H. Annuities	Yes ( ) No ( )			
I. Trusts	Yes ( ) No ( )			
J. Insurance Payments	Yes ( ) No ( )			
K. IRA/KEOGH Payments	Yes ( ) No ( )			
L. Interest Income (on bonds, bank acct's, CD's etc.)	Yes ( ) No ( )			
M. Lease Income	Yes ( ) No ( )			
N. Rental Income	Yes ( ) No ( )			
O. BIA General Assistance	Yes ( ) No ( )			
Q. Tribal Income	Yes ( ) No ( )			
R. Payments on Contract for Deed	Yes ( ) No ( )			
S. Contributions from Relatives or Others	Yes ( ) No ( )			
<b>***Please provide proof of all income received.***</b>		Direct Deposit	List amount of income. If not received monthly, indicate how often.	
			You	Your Spouse
R. Gross Earnings from Employment	Yes ( ) No ( )	<b>X</b>		
S. Child Support Payments	Yes ( ) No ( )			
T. Alimony Payments	Yes ( ) No ( )			
U. Income from Mineral or Timber Rights	Yes ( ) No ( )			
V. Income from Life Estate	Yes ( ) No ( )			
W. Any Other Income	Yes ( ) No ( )			

### **13. Would you like to Register to Vote?**

Any citizen in the State of South Dakota who meets the voter registration requirements and applies for public assistance must be provided the opportunity to register to vote.

#### **A. If you are not registered to vote where you live now, would you like to apply to vote?**

Yes (  ) No (  ) If you checked yes, the Department of Social Services will send you a voter registration form. Return the completed registration card to the County Auditor in your county of residence or to your local Department of Social Services office, Department of Human Services office, WIC office or military recruitment office. **The deadline for registration is 15 days before any election.**

**If you did not check either box, you will be considered to have decided not to register to vote at this time.**

Please note that the information and office to which application was made will remain confidential and be used for voter registration purposes. Applying to register or refusing to register to vote will not affect the amount of assistance or services that you may receive from the Department of Social Services. If you would like help filling out the voter registration form, we will help you. The decision whether to seek or accept help is yours. You may fill out the application in private.

If you believe that someone has interfered with your right to register to vote, your right to privacy in deciding whether to register or in applying to register to vote, or your right to choose your own political party or other political preference, you may file a complaint with the:

South Dakota Secretary of State, 500 E Capitol, Pierre SD 57501, (605) 773-3537

## **ASSIGNMENT OF MEDICAL SUPPORT, INSURANCE PROCEEDS**

An application for and acceptance of medical assistance paid from the Department of Social Services shall operate as an assignment and subrogation of any rights to medical support, insurance proceeds, or both that the applicant or recipient may have. Any rights or amounts so assigned or subrogated shall be applied against the cost of the applicant's or recipient's care.

## **DISCLOSURE OF ANNUITIES AND STATE TO BE NAMED AS REMAINDER BENEFICIARY**

Public Law No. 109-171 Deficit Reduction Act of 2005 Section 6012 requires individuals applying for long-term care medical assistance and an individual whose eligibility is being reviewed for purposes of determining whether the individual continues to be eligible for long-term care assistance to disclose the description of any interest the individual or the individual's spouse has in an annuity or similar financial instrument. Failure to disclose this information results in ineligibility for assistance. In addition, a recipient of long term care assistance must name the department as a preferred remainder beneficiary of any interest the individual or individual's spouse has in an annuity or similar financial instrument purchased and owned after February 7, 2006. **Note: The annuity will also be considered a resource.**

## **ESTATE RECOVERY AND MEDICAL ASSISTANCE LIENS**

Under Federal and State law, the Department of Social Services is authorized to make recovery from the estates of deceased medical assistance recipients who were permanently institutionalized or who were at least 55 years of age and for whom the Department made a payment for nursing facility services, intermediate care facility services for the mentally retarded, other medical institutional services, home and community based services, hospital services, and prescription drug services. The Department of Social Services is authorized to recover the debt of a medical assistance recipient from the estate of a surviving spouse. If a surviving spouse wishes to limit the amount of the surviving spouse's estate that will be liable for recovery for the amount of medical assistance paid on behalf of the recipient, the surviving spouse must file a petition within six months of the death of the medical assistance recipient. The petition will determine the amount of the surviving spouse's estate from which recovery may be claimed for Medicaid expended on behalf of the recipient. The petition must be filed on the Department's form.

Under Federal and State law, the Department of Social Services may impose a medical assistance lien against real property owned by a recipient who has received a benefit from the Department of Social Services for the services of a nursing facility, an intermediate care facility for the mentally retarded, or other medical institution. The Department of Social Services will issue a separate notice when the Department decides to impose a lien. The notice will describe the amount of the lien and the real property to which the lien is to attach.

Under State law, the Department of Social Services is authorized to recover any funds of the resident kept or maintained by the nursing home or other facility if the resident was receiving medical assistance from the Department at the time of death.

## **PRIVACY ACT STATEMENT**

Federal and State Law and Regulations limit the use and disclosure of confidential information concerning applicants and recipients of economic and medical assistance programs to purposes directly related to the administration of those programs. When you apply for assistance from the Department of Social Services, you will be asked to provide your Social Security Number on the application form. Title 42 of the Code of Federal Regulations Part 435.910(a), requires the furnishing of Social Security Numbers as a condition of eligibility for Medicaid. The Department uses your number in its computer processing for eligibility determination, welfare fraud investigations and audits. Social Security Numbers are also used to verify income information through agencies such as Internal Revenue Service, Department of Labor, and Social Security Administration, etc., to prevent a person or family from receiving duplicate benefits under any program, to make mass changes in benefits easier to implement and to determine the accuracy and reliability of information given to the department by applicants for and recipients of assistance.

## **VERIFICATIONS**

Information you give to answer the questions on this form, and information obtained by the department to verify your answers will be used to determine your eligibility and level of benefits. Your benefits may change from month to month, or be stopped, based on this information.

Federal and state officials will verify information given on this form to determine if it is correct. A department representative may contact you or may contact other people in order to verify your eligibility for assistance. Information given will also be verified by computer cross-matching with other agencies and private sectors. When state and federal personnel verify the information on this application, if what is reported is found to be incorrect your Medical case may be denied or terminated and you may be subject to criminal prosecution for knowingly providing false information.

## **CIVIL RIGHTS GUARANTEE**

As a recipient of Federal financial assistance and a State or local governmental agency, the Department of Social Services does not exclude, deny benefits to, or otherwise discriminate against any person on the ground of race, color, or national origin, or on the basis of disability or age in admission or access to, or treatment or employment in, its programs, activities, or services, whether carried out by the Department of Social Services directly or through a contractor or any other entity with which the Department of Social Services arranges to carry out its programs and activities; or on the basis of actual or perceived race, color, religion, national origin, sex, gender identity, sexual orientation or disability in admission or access to, or treatment or employment in, its programs, activities, or services when carried out by the Department of Social Services directly or when carried out by sub-recipients of grants issued by the United States Department of Justice, Office on Violence against Women.

You may file a complaint by contacting: Discrimination Coordinator, Director of DSS Division of Legal Services, 700 Governors Drive, Pierre, SD 57501. (605)773-3305. In accordance with state and federal laws, you may also file a complaint with the following agencies: (1) the South Dakota Division of Human Rights (605)773-3681 and (2) Office of Civil Rights, Jocelyn Samuels, Director, US Department of Health and Human Services, 200 Independence Ave, S.W. Room 509F HHH Bldg., Washington DC 20201.

