
See §0911.05 (Excluded Income) for general provisions which apply to all programs.

MinnesotaCare:

Also exclude income from the following sources:

- > Earned income of full- or part-time students under age 19. See §0911.09.05 (Dependent Child Income).
- > Infrequent or irregular income. Income is infrequent or irregular if it is not possible to anticipate receiving it. Count income that applicants/enrollees regularly receive at least annually.

EXAMPLE:

The Brown family receives \$10,000 every December from Mrs. Brown's parents. Count this money as income.

EXAMPLE:

Sarah received a \$500 gift from her uncle last year. She explains that it was a one-time gift because her uncle sold some stock. Do not count this income.

- > Lump sum income. Generally, lump sums are one-time, non-recurring payments. Examples include winnings, inheritances, insurance settlements, and retroactive payments.

EXAMPLE:

Household is approved for social security survivors' benefits because of the death of the father. They receive a lump sum of \$5,000 for previous months and ongoing benefits of \$1,000 per month. Exclude the \$5,000 retroactive payment.

EXAMPLE:

Enrollee receives a cost of living adjustment to his wages effective July 1. He receives a retroactive payment for July and August on his September 1 paycheck. Exclude the portion of the pay check that covers the retroactive pay increase.

EXAMPLE:

Enrollee wins \$4,000 at a casino. Exclude the winnings.

Some lump sums, such as winnings over a given amount, may be taxable. If

an applicant or enrollee's tax forms include a lump sum, subtract the lump sum from the adjusted gross income unless the household anticipates receiving income from the same source in the next year. See §0911.11 (Computing Countable Income--MinnesotaCare).

Some other types of income may be partially excluded. See the sections on specific types of income for more information.

M. S. 256.9354 subd. 4a

MA/GAMC:

METHOD A:

Exclude irregular cash gift income totaling \$30 or less per calendar quarter for each person whose income is counted. Count gifts the client receives on a regular basis or which exceed \$30.

EXAMPLE:

Martha applies for MA for herself and her children. Her parents give her \$25 per month to help with expenses. Count this gift because Martha receives it regularly.

EXAMPLE:

Jennifer receives MA for herself and her 2 sons. Jennifer reports on her 6-month income review that she and the children each received \$25 as a birthday gift. Exclude this income because it totals less than \$30 per person per quarter and is received infrequently.

METHOD B:

Infrequent or irregular income is income that is received no more than once in a calendar quarter from a single source or could not reasonably be expected.

Exclude the first \$30 per calendar quarter of irregular or infrequent earned income. This exclusion is **applies** to the combined total irregular/infrequent earned income of all people whose income is being considered.

EXAMPLE:

Betsy reports receiving \$38 for babysitting a neighbor's child. She does not babysit regularly. Exclude **the first \$30 of** this income because it is irregular and **count the remaining \$8.**

Exclude **the first \$60 per calendar quarter of** irregular or infrequent unearned income. Apply this exclusion to **the total** irregular/infrequent unearned income received **in** each **calendar quarter**. **To be considered infrequent** income, the same type of income may be received more than once in a calendar quarter as long as it is not from the same source. This exclusion is applied to the combined total irregular/infrequent unearned income of all people whose income is being considered.

EXAMPLE:

Herman and Sheila receive MA using a manual monthly spenddown. See §0913.11 (Manual Monthly Spenddown Calculation). They report on their monthly income report for April that they received **\$65** as an anniversary gift from friends. Herman received **\$20** for his birthday from his mother. They do not expect to receive additional gifts during the calendar quarter.

Total all the infrequent unearned income (\$85) and exclude the first \$60. The remaining \$25 is counted as unearned income because it exceeds **the first \$60 in a calendar quarter.**

Exclude as income gifts used by an individual to pay tuition or other education related expenses.

Except for long term care budgeting, exclude income from the Mille Lacs Band of Ojibwe Elder Supplemental Assistance Program. See §0911.09.21 (Income From Tribal Land Settlements and Trusts).