

MinnesotaCare:

People may receive a one-time payment covering several retroactive months when SSI or RSDI is approved. Do not count the retroactive payments received for a previous period.

EXAMPLE:

Roland is enrolled in MinnesotaCare. On his annual renewal due for December, he reports that he was approved for RSDI. He received a retroactive lump sum payment of \$3,000 in October covering the months of May-October. He will receive \$500 per month beginning in November. Do not count the \$3,000 in determining his eligibility or premium amount for the new eligibility period because it is a one-time payment and will not be received during the next 12 months.

MA/GAMC:**METHOD A:**

Exclude retroactive lump sum payments of SSI and all other lump sum income (including RSDI) of an SSI recipient even if the lump sum is a retroactive payment for a period for which the SSI recipient received MA. However, count any portion of an RSDI lump sum payment designated as dependent benefits as unearned income to the dependent in the month received.

Count retroactive lump sum RSDI payments for people who do not receive SSI as unearned income in the month received and an asset in the following month if retained.

METHOD B:

Exclude retroactive lump sum payments of SSI as income and assets in the month received.

Count retroactive RSDI lump sum payments as unearned income in the month received. See §0911.09.23 (Lump Sum Income) for more information on budgeting lump sums.

Exclude as an asset for 9 months any retroactive SSI or RSDI lump sum payments, received on or after 3/2/04, if retained after the month of receipt.

Exclude as an asset for 6 months any retroactive SSI or RSDI lump sum payments, received before 3/2/04, if retained after the month of receipt. This includes money deposited in a separate dedicated account for the medical, health, educational and disability related needs of a child. Follow §0909.21.03 (Supplemental Needs Trusts) if the retroactive payment is issued under the Sullivan vs. Zebley decision and is used to fund a supplemental needs trust.

SSI, RSDI or Special Veterans Benefits for the Elderly may be reissued by the SSA when an individual rep payee of 15 or more beneficiaries or an organization rep payee has been found to misuse the benefits. Treat the reissuance of these benefits as follows:

- > SSI - Exclude the reissuance as income and an asset in the month received. Exclude as an asset for 9 months if retained after the month of receipt.
- > RSDI & Special Veterans Benefits – Count the reissuance as income in the month received, unless the original payment of the income was used in determining the individual's MA eligibility. Exclude as an asset for 9 months if retained after the month of receipt.

For Medicare Part B reimbursements for non-LTCF recipients:

- > If Medicare Part B premiums paid by the client were used as an MA spenddown expense (this would occur when clients add SLMB coverage to MA retroactively), count the lump sum reimbursement as income in the month received. Do not count a lump sum Medicare Part B reimbursement when Part B was not used as a MA spenddown expense in the MA computation for the months which the reimbursement covers. See §0907.21.09.05 (Medicare Supplement Programs: SLMB) and §0910.05.05 (Medicare Premium Payment).

For Medicare Part B reimbursements for LTCF recipients:

- > Count a lump sum Medicare premium reimbursement due to Buy-In eligibility in the month of receipt. This is because the gross RSDI amount is not budgeted for these clients until it is actually received. See §0913.13 (Long Term Care Spenddown Calculation) and §0910.05.05 (Medicare Premium Payment).