

RECEIPT OF LUMP SUM FEDERAL BENEFITS* BY VOLUNTARY AGENCIES SERVING AS REPRESENTATIVE PAYEE OR OTHER FIDUCIARY FOR INDIVIDUALS

1. Notify the individual's Medicaid District upon receipt of a notice of change in income from the benefit paying agency, or if a notice is not received, upon receipt of retroactive funds or change in income.

2. Determine whether the amount of the retroactive award is an amount which will impact on the individual's eligibility for Medicaid.

- The current Medicaid eligibility resource level for an individual effective January 1, 2012 is \$14,250;
- The current SSI resource level for an individual is \$2,000.

3. A retroactive award from Social Security or Railroad Retirement is considered income in the month received and exempt for nine months following the month of receipt.¹

- Within nine months following the month of receipt of the retroactive Social Security/Supplemental Security Income/Railroad Retirement award: Take action to assist the individual and actively involved family in expending the funds for the individual's needs and interests consistent with the individual's personal expenditure plan; **and** If such expenditures do not provide for the expenditure within the 9 month exemption period of an amount of funds that will maintain the individual's Medicaid eligibility **or** if the amount of funds necessary to expend to maintain an individual's Medicaid eligibility will not be expended within such time frame, seek to place the amount in excess of the eligibility level into a Supplemental Needs Trust or other qualifying exception trust.

*For questions regarding specific benefits, contact the benefit paying agency or the appropriate Medicaid District.

¹ For determining Medicaid eligibility, a retroactive award from other benefits is countable income in the month received and a countable resource thereafter.

NOTE: THIS CHART IS INTENDED TO SERVE ONLY AS A GENERAL SUMMARY AND SHOULD NOT BE RELIED UPON AS THE PROVIDER'S SOLE SOURCE OF INFORMATION WHEN ADDRESSING A BENEFIT RECEIVED FOR AN INDIVIDUAL SERVED BY THE AGENCY. EACH INDIVIDUAL'S SITUATION MUST BE REVIEWED CAREFULLY TO ASSURE THAT ANY LUMP SUM BENEFIT PAYMENTS ARE HANDLED IN THE BEST INTEREST OF THE INDIVIDUAL. PLEASE REFER TO THE OPWDD ADVISORY ON THIS SUBJECT AND THE INFORMATION REFERENCED THEREIN FOR ADDITIONAL INFORMATION.