

**CONNECTICUT DEPARTMENT OF SOCIAL SERVICES
UNIFORM POLICY MANUAL**

Date: 10-1-97

Transmittal: UP-97-24

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Section: Treatment of Assets	Type: POLICY
Chapter: Excluded Assets	Program: AABD MAABD
Subject: Excluded Assets - AABD and MAABD	

4020.10 G. Payments Excluded by Federal Law (continued)

16. Japanese Restitution payments and payments made to residents of the Aleut and the Pribilof Islands made pursuant to Public Law 100-383;
17. Effective October 15, 1990, Radiation Exposure Compensation payments made pursuant to Section 6 (h)(2) of Public Law 101-426;
18. Effective September 1, 1991, reparation payments made under Section 500-506 of the Austrian General Social Insurance Act;
19. stocks, a partnership interest, land or an interest in land, an interest in a settlement trust and up to \$2,000 in total cash payments per year per person made pursuant to the Alaska Native Claims Settlement Act (Section 15 of Public Law 100-241);
20. retroactive Agent Orange Settlement payments made by the Department of Veterans Affairs pursuant to Public Law 102-4;
21. payments made to victims of Nazi persecution pursuant to Public Law 103-286;
22. payments received from a fund established by a State to as compensation for expenses incurred or losses suffered as a result of a crime for a period of nine months beginning with the month following the month of receipt;
23. payments made to offspring of Vietnam veterans who are born with spina bifida pursuant to Public Law 104-204.

H. Burial Funds and Arrangements

1. For all assistance units except units consisting of MCCA spouses, an amount up to \$1,200 per assistance unit member is excluded.
2. For an assistance unit consisting of a MCCA spouse, an amount up to \$1,500 each for the assistance unit member and for his or her spouse is excluded.
3. The exclusion is reduced by:
 - a. any amount in an irrevocable burial contract available to meet burial expenses; and
 - b. the face value of the assistance unit member's life insurance policies if the cash surrender value of such policies is excluded.

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4020.10 K. Motor Vehicles (continued)

3. If no motor vehicle is totally excluded, up to \$4,500 of the fair market value of one motor vehicle is excluded.

L. Life Insurance Policies

1. The cash surrender value of life insurance policies on any assistance unit member is excluded if the total face value of all such policies does not exceed \$1,500. In computing the face value of life insurance, the Department does not consider term insurance and irrevocable burial funds.
2. Life insurance policies such as term insurance policies, which provide temporary coverage but have no cash surrender value, are totally excluded, regardless of their face value.

M. Assets Necessary to Fulfill an Approved Plan for Self-support

1. Assets which are set aside in a separate account by the applicant or recipient to fulfill a component of a plan to achieve self-support are excluded when the plan is:
 - a. designed especially for the individual; and
 - b. in writing; and
 - c. approved by the Social Security Administration.
2. The exclusion is allowed for the same period that the Social Security Administration uses the PASS deduction in calculating the individual's Supplemental Security Income.
3. The amount of the exclusion is equal to the amount allowed by the Social Security Administration in the individual's self-support plan.

N. Replacement of Lost, Damaged, or Stolen Excluded Assets

Cash (including any interest earned on the cash) or in-kind replacement received from any source to repair or replace an excluded asset is excluded.

1. The cash (and the interest) must be used to repair or replace the asset within nine months from the date the individual receives the cash.
2. Any of the cash not so used is counted as an asset beginning the first quarter after the nine month period.

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4020.10 R. Bank Accounts Earmarked for Payment of Employment Taxes for Household Employees (continued)

2. the recipient continues to be eligible for such payments or has been eligible for such payments at some time during the current calendar year for which taxes are still owed, and
3. the balance in the account is commensurate with the amount of taxes for which the recipient is currently obligated.

S. Payments Made to Certain Hemophilia Patients Who Contracted HIV from Blood Transfusions

1. Payments made under the settlement to the lawsuit entitled "Factor VIII or IX Concentrate Blood Products Litigation" MDL 986 (No. 93-C-7452, Northern District of Illinois) are excluded pursuant to Section 4735 of the Balanced Budget Act of 1997 (BBA).
2. Payments received under the Ricky Ray Hemophilia Relief Fund Act of 1998 (the Ricky Ray Act), Public Law 105-369 are excluded.

T. Assets Excluded for Working Individuals with Disabilities (MAABD Only)

An individual formerly receiving Medicaid under the "Working Individuals with Disabilities" coverage group has the following assets excluded if such assets were excluded while the individual was a Medicaid recipient under that coverage group:

1. retirement and medical savings accounts established pursuant to 26 USC 220 and held by either the individual or his or her spouse; and
2. accounts held by the individual or spouse and designated by such person as being held for the purpose of buying goods or services that will increase the employability of the individual. Such accounts are subject to the approval of the Department.

(Cross References: 2540.85, 4020.11)

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Date: 10-1-00	Transmittal: UP-00-22	4020.11
Section: Treatment of Assets	Type:	POLICY
Chapter: Excluded Assets	Program:	MAABD
Subject: Excluded Assets - Working Individuals with Disabilities		

- 4020.11 A. In addition to the assets listed at 4020.10, the following assets are excluded in determining the eligibility of working individuals with disabilities (Cross Reference: 2540.85):
1. retirement and medical savings accounts established pursuant to 26 USC 220 and held by either the individual or his/her spouse; and
 2. accounts held by the individual or spouse and designated by such person as being held for the purpose of buying goods or services that will increase the employability of the individual. Such accounts are subject to the approval of the Department.
- B. The assets excluded under paragraph A retain their exclusion in the Medicaid program for the lifetime of the individual, even if he or she loses eligibility for Medicaid under this coverage group.