



SUMMARY

Medicaid State Plan Amendment
MN-24-0036

CMS has approved this state plan amendment on 12/10/2024 without change. The amendment has an effective date of July 1, 2024.

The amendment establishes, under 1902(r)(2) of the Social Security Act, that state tax credits, rebates, and refunds must not be counted as income in the month of receipt, or as assets for a period of 12 months after the month of receipt when determining eligibility for Medicaid for persons whose eligibility category is based on blindness, disability, or age of 65 or more years.

This includes the following eligibility groups under the Act: mandatory categorically needy groups; all optional categorically needy groups; Qualified Medicare Beneficiaries (QMB), Service Limited Medicare Beneficiary (SLMB), and Qualified Individuals; and medically needy groups (including children).

This amendment also requires that a training stipend paid to teachers under the READ Act not be counted as income or assets when determining Medicaid eligibility for persons whose eligibility category is based on blindness, disability, or age of 65 or more years.

This includes the following eligibility groups under the Act: mandatory categorically needy groups; all optional categorically needy groups (including children); Qualified Medicare Beneficiaries (QMB), Service Limited Medicare Beneficiary (SLMB), and Qualified Individuals; and medically needy groups.

The Minnesota Department of Human Services is committed to providing information to our partners and the people we serve in an accessible format. For a summary of proposed changes in an accessible format, refer to the original public comment message. If you need an accessible version of the amendment pages, submit your request through the [DHS SPA mailbox](#). We will respond to your request within five business days. When you make your request, tell your contact information and which format you prefer for the material.

MN - Submission Package - MN2024MS0006O - (MN-24-0036) - Eligibility

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CMS-10434 OMB 0938-1188

Package Information

Package ID MN2024MS0006O
Program Name N/A
SPA ID MN-24-0036
Version Number 2
Submitted By Patricia Callaghan
Package Disposition



Submission Type Official
State MN
Region Chicago, IL
Package Status Approved
Submission Date 9/30/2024
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Medicaid State Plan Eligibility

Eligibility Groups - Mandatory Coverage

Individuals in 209(b) States Who Are Age 65 or Older or Who Have Blindness or a Disability

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In 209(b) states, individuals who are 65 or older or who have blindness or a disability, who meet more restrictive criteria than used in SSI

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Superseded SPA ID	MN-22-0029		
	System-Derived		

The state covers the mandatory eligibility group for individuals in 209(b) states who are age 65 or older or who have blindness or a disability in accordance with the following provisions:

A. Characteristics

Individuals qualifying under this eligibility group must meet the following criteria:

1. Be age 65 or older or have blindness or a disability;
2. Meet more restrictive requirements than SSI, as defined by the state in section B;
3. Have income and resources at or below the standard for this group.

Individuals in 209(b) States Who Are Age 65 or Older or Who Have Blindness or a Disability

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B. Financial Methodologies

- The more restrictive requirements used are described in the More Restrictive Requirements than SSI under 1902(f) RU.
- Less restrictive methodologies are used in calculating countable income.

- Yes
- No

The less restrictive income methodologies are:

- The difference between one income standard and another is disregarded.
 - Between the following percentages of the FPL:
 - Between the medically needy income limit and a percentage of the FPL:
 - Between the SSI Federal Benefit Rate and:
 - Between other income standards:

Census Bureau wages are disregarded.

A specified type of income is disregarded:

Between this standard: The ABD categorically needy 1902(f) standard

and this standard: 100% FPL, using federal poverty levels in effect on July 1 of each 12 month period.

Description of disregard: Disregard earned income of temporary census employees who were enrolled in Minnesota health care programs on March 1, 2000.

Name of income type:	Description:
COLA	Disregard the Cost of Living Adjustments to RSDI (title II) benefits from January 1 through June 30th of each year.
In-kind Income	Disregard all in-kind income.
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund.
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota Department of Human Services, CN 09-1775 (DWF/FLN).

Name of income type:	Description:
NIH Study	Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health.
Frontline Worker Pay	Disregard payments made to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2 sections 1 through 3.
State Tax-related Items	Disregard all state tax refunds, credits and rebates.
Teacher Stipend	Disregard stipends paid to teachers for training purposes under the READ Act.

3. Less restrictive methodologies are used in calculating countable resources.

Yes

No

The less restrictive resource methodologies are:

General resource disregard:

Name of disregard:	Description:
Family Disregard	For one child living with disabled or elderly individual disregard an additional \$3000 in assets; and disregard \$200 for each additional child. For each child living with a married couple, disregard \$200 per child.

Real property not otherwise excluded is disregarded.

Description of disregard: Disregard the homestead of a person in a long-term care facility if the home is the residence of the person's (a) sibling living in the home for at least one year immediately before the date of the client's admission to the long term care facility and who has an equity interest in the home; or (b) adult child or grandchild who lived in the home for at least 2 years immediately before the date of the client's admission to the long term care facility and who provided verifiable care to the client to permit the client to live at home instead of the long term care facility.

A specified type of resource is disregarded:

Name of resource type:	Description:
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota Department of Human Services, CN 09-1775(DWF/FLN)
NIH Study	Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services National Institutes of Health.
COVID-19 Frontline Worker Pay	Disregard any payments made to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2 sections 1 through 3, without regard to the manner or period of retention.
Teacher Stipend	Disregard as resources all stipends to teachers for the purpose of training under the READ Act.

- A beneficiary of a "qualified state long-term care insurance partnership" policy (partnership policy), as defined in section 1917(b)(1)(C) of the Social Security Act and 45 CFR 144.200 et seq., is provided a resource disregard, equal to the amount of the insurance benefit payments made to or on behalf of the individual from the partnership policy.
- The following less restrictive methodologies are used:

Name of methodology:	Description:
Asset Reduction	<p>Allow reduction of excess assets to achieve eligibility in the month of application by (i) paying incurred health services expenses for services otherwise covered by Medicaid and/or (ii) reducing excess assets in any manner not considered an uncompensated transfer subject to penalty as defined in state and federal Medicaid law.</p> <p>Allow reduction of excess assets to achieve eligibility in any retroactive month by (i) designating a \$1500 burial fund for oneself, a spouse and each eligible dependent child and/or (ii) paying for health services costs incurred during the retroactive period.</p>

Name of methodology:	Description:
Child Assets	Disregard all assets of children under age 21.
Transition Disregard	For a disabled individual ineligible under section 1902(a)(10)(A)(ii)(XIII) due to loss of earnings, and qualifying for Medicaid under another category, continue to disregard for 12 consecutive months the assets allowed and excluded under the employment incentive category of section 1902(a)(10)(A).
Disregard of Employment Incentive Assets Account (EIAA)	<p>Disabled individuals eligible under section 1902(a)(10)(A)(ii)(XIII) will, after 24 months of consecutive enrollment under such section, qualify to establish one or more Employment Incentives Asset Accounts (EIAA). Assets that may be designated as an EIAA include assets such as a savings account, investments, mutual funds, retirement and pension accounts, and medical expense accounts. An EIAA may contain the individual's retirement accounts and medical expense benefits through an employer. An EIAA may contain up to \$17,000 of the individual's other non-excluded liquid assets.</p> <p>An asset disregard will apply, under the following terms:</p> <ol style="list-style-type: none"> 1) The individual shall identify to the state the account(s) that he or she designates as his or her Employment Incentives Assets Account(s) before disenrollment from the group. 2) The value of the assets in the EIAA are disregarded, including growth or appreciation, except that any amount by which the value of the other liquid assets exceeds \$17,000 in an EIAA is not disregarded. 3) Once the assets are designated as an EIAA they are only disregarded when the individual is enrolled in another group for individuals age 65 and older to which the EIAA disregard is applied. 4) If a person's Medicaid eligibility ends at any point before turning age 65, the EIAA will cease to exist. <p>Group to which disregard is applied: Individuals age 65 and older eligible under §1902(f), 1902(a)(10)(A)(ii)(I), 1902(a)(10)(A)(ii)(V), 1902(a)(10)(A)(ii)(VI), 1902(a)(10)(A)(ii)(X), 1902(a)(10)(A)(ii)(XI); medically needy individuals age 65 and older eligible under §1902(a)(10)(C).</p>

Individuals in 209(b) States Who Are Age 65 or Older or Who Have Blindness or a Disability

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C. Income Standard Used

The income standard for this group is:

- 1. A percentage of the federal poverty level:
- 2. A dollar amount
- 3. Another standard

Statewide standard

The statewide standard is:

Household size	Standard
2	\$602.00
4	\$854.00
6	\$1063.00
8	\$1259.00
10	\$1423.00

The state uses an additional incremental amount for larger household sizes.

- Yes No

Incremental Amount

\$74.00

The dollar amounts increase automatically each year

Yes No

Individuals in 209(b) States Who Are Age 65 or Older or Who Have Blindness or a Disability

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D. Resource Standard Used

The resource standard for this group is:

Individual: \$3750.00
Couple: \$6450.00

Individuals in 209(b) States Who Are Age 65 or Older or Who Have Blindness or a Disability

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E. Spenddown

The state allows individuals to deduct incurred medical and remedial expenses (spend down) to become eligible under this group. Spenddown is defined in the Handling of Excess Income (Spenddown) RU.

Individuals in 209(b) States Who Are Age 65 or Older or Who Have Blindness or a Disability

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F. Additional Information (optional)

Medicaid State Plan Eligibility

Eligibility Groups - Mandatory Coverage

Qualified Medicare Beneficiaries

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Individuals with income equal to or less than 100% of the FPL, who are entitled to Medicare Part A, and who qualify for Medicare cost-sharing.

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The state covers the mandatory qualified Medicare beneficiaries group in accordance with the following provisions:

A. Characteristics

Individuals qualifying under this eligibility group must meet the following criteria:

1. Are entitled to hospital insurance benefits under part A of title XVIII (Medicare Part A), including individuals who have purchased a premium to enroll in Part A.
2. Have income and resources at or below the standard for this group.

Qualified Medicare Beneficiaries

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B. Financial Methodologies

1. SSI methodologies are used in calculating household income. Please refer as necessary to Non-MAGI Methodologies, completed by the state.

2. Less restrictive methodologies are used in calculating countable income.

- Yes
- No

The less restrictive income methodologies are:

Census Bureau wages are disregarded.

A specified type of income is disregarded:

Description of disregard: Disregard earned income of temporary census employees who were enrolled in Minnesota health care programs on March 1, 2020.

Name of income type:	Description:
Widow or widower(s) disregard	Disregard all RSDI cost of living increases effective January 1, 1984 or later for individuals who meet requirements of section 1634(d).
Pickle disregard	Disregard RSDI cost of living adjustments under the Pickle amendment.
Disabled adult children disregard	Disregard RSDI benefits of disabled adult children who meet requirements of section 1634.
1619(a) and (b) disregard	Disregard income of individuals deemed to be an SSI recipient under 1619(a) or (b).
Community spouse and family allowance disregard	Disregard the community spouse monthly income allowance and family allowance as defined at section 1924(d)(2) and (3) to the extent it is made available to the community spouse and family.
COLA	Disregard the annual cost of living adjustments to RSDI (title II) benefits from January 1 through June 30th of each year.
In-kind income	Disregard all in-kind income.

Name of income type:	Description:
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund.
NIH Study	Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health. Disregard payments made to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2 sections 1 through 3.
State Tax-related Items	Disregard state tax refunds, credits, and rebates.
	Disregard stipends paid to teachers for purposes of training under the READ Act.

3. Less restrictive methodologies are used in calculating countable resources.

Yes

No

The less restrictive resource methodologies are:

General resource disregard:

Real property not otherwise excluded is disregarded.

Name of disregard:	Description:
MSP General Disregard	Disregard the difference between three times the SSI asset limit for an individual, and \$10,000 in non-excluded assets; and the difference between three times the SSI asset limit for a couple, and \$18,000 in non-excluded assets

Description of disregard: Disregard the homestead of a person in a long-term care facility if the home is the residence of the person's (a) sibling living in the home for at least one year immediately before the date of the client's admission to the long term care facility and who has an equity interest in the home; or (b) adult child or grandchild who lived in the home for at least 2 years immediately before the date of the client's admission to the long term care facility and who provided verifiable care to the client to permit the client to live at home instead of the long term care facility.

A specified type of resource is disregarded:

Name of resource type:	Description:
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota Department of Human Services, CN 09-1775 (DWF/FLN).
NIH Study	Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund
COVID-19 Frontline Worker Pay	Disregard payments made to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2 sections 1 through 3.
State Tax-related Items	Disregard state tax refunds, credits and rebates for 12 months following the month of receipt.
Teacher Stipend	Disregard from resources all stipends paid to teachers for purposes of training under the READ Act.

The following less restrictive methodologies are used:

Name of methodology:	Description:
Asset Reduction	<p>Allow reduction of excess assets to achieve eligibility in the month of application by (i) paying incurred health services expenses for services otherwise covered by Medicaid and/or (ii) reducing excess assets in any manner not considered an uncompensated transfer subject to penalty as defined in state and federal Medicaid law.</p> <p>Allow reduction of excess assets to achieve eligibility in any retroactive month by (i) designating a \$1500 burial fund for oneself, a spouse and each eligible dependent child and/or (ii) paying for health services costs incurred during the retroactive month.</p> <p>Allow individuals who are permitted to designate</p>

Name of methodology:

Description:

assets for a \$1500 burial fund to make or change that designation within 3 months of the month of application.

Qualified Medicare Beneficiaries

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C. Income Standard Used

The amount of the income standard for this group is 100% FPL.

D. Resource Standard Used

The resource standard is the same used to determine eligibility for the Medicare Part D full-benefit low-income subsidy (LIS) (but without regard to the life insurance policy exclusion applied in LIS resource eligibility determinations). This standard is three times the SSI resource standard, adjusted annually in accordance with the consumer price index.

E. Medical Assistance Provided

Medical assistance is limited to payment of co-insurance and deductibles for Medicare Parts A, B and C and payment for the premiums for Medicare Parts A and B.

Medical assistance begins the first day of the month following the month in which the individual is determined to qualify for this eligibility group.

Qualified Medicare Beneficiaries

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F. Additional Information (optional)

Medicaid State Plan Eligibility

Eligibility Groups - Mandatory Coverage

Specified Low Income Medicare Beneficiaries

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Individuals with income above 100% and below 120% of the FPL who are entitled to Medicare Part A, who qualify for payment of Medicare Part B premiums.

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The state covers the mandatory specified low income Medicare beneficiaries group in accordance with the following provisions:

A. Characteristics

Individuals qualifying under this eligibility group must meet the following criteria:

1. Would qualify as Qualified Medicare Beneficiaries (described in section 1905(p)(1) of the Act), except that their income exceeds the income level for that eligibility group.
2. Have income below the income standard and resources at or below the resource standard for this group.

Specified Low Income Medicare Beneficiaries

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B. Financial Methodologies

1. SSI methodologies are used in calculating household income. Please refer as necessary to Non-MAGI Methodologies, completed by the state.

2. Less restrictive methodologies are used in calculating countable income.

- Yes
- No

The less restrictive income methodologies are:

Census Bureau wages are disregarded.

A specified type of income is disregarded:

Description of disregard: Disregard earned income of temporary census employees who were enrolled in Minnesota health care programs on March 1, 2020.

Name of income type:	Description:
Widow or widower(s) disregard	Disregard all RSDI cost of living increases effective January 1, 1984 or later for individuals who meet requirements of section 1634(d).
Pickle disregard	Disregard RSDI cost of living adjustments under the Pickle amendment.
Disabled adult children disregard	Disregard RSDI benefits of disabled adult children who meet requirements of section 1634.
1619(a) and (b) disregard	Disregard income of individuals deemed to be an SSI recipient under 1619(a) or (b).
Community spouse and family allowance disregard	Disregard the community spouse monthly income allowance and family allowance as defined at section 1924(d)(2) and (3) to the extent it is made available to the community spouse and family.
COLA	Disregard the annual cost of living adjustments to RSDI (title II) benefits from January 1 through June 30th of each year.
In-kind income	Disregard all in-kind income.

Name of income type:	Description:
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund.
NIH Study	Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health. Disregard payments made to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2 sections 1 through 3.
State Tax-related Items	Disregard state tax refunds, credits and rebates.
	Disregard stipends paid to teachers for purposes of training under the READ Act.

3. Less restrictive methodologies are used in calculating countable resources.

Yes

No

The less restrictive resource methodologies are:

General resource disregard:

Real property not otherwise excluded is disregarded.

Name of disregard:	Description:
MSP General Disregard	Disregard the difference between three times the SSI asset limit for an individual, and \$10,000 in non- excluded assets; and the difference between three times the SSI asset limit for a couple, and \$18,000 in non-excluded assets

Description of disregard: Disregard the homestead of a person in a long-term care facility if the home is the residence of the person's (a) sibling living in the home for at least one year immediately before the date of the client's admission to the long term care facility and who has an equity interest in the home; or (b) adult child or grandchild who lived in the home for at least 2 years immediately before the date of the client's admission to the long term care facility and who provided verifiable care to the client to permit the client to live at home instead of the long term care facility.

A specified type of resource is disregarded:

Name of resource type:	Description:
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota Department of Human Services, CN 09-1775 (DWF/FLN).
NIH Study	Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund
COVID-19 Frontline Worker Pay	Disregard payments made to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2 sections 1 through 3.
State Tax-related Items	Disregard from resources state tax refunds, credits and rebates for 12 months following the month of receipt.
Teacher Stipend	Disregard from resources all stipends paid to teachers for purposes of training under the READ Act.

The following less restrictive methodologies are used:

Name of methodology:	Description:
Asset Reduction	<p>Allow reduction of excess assets to achieve eligibility in the month of application by (i) paying incurred health services expenses for services otherwise covered by Medicaid and/or (ii) reducing excess assets in any manner not considered an uncompensated transfer subject to penalty as defined in state and federal Medicaid law.</p> <p>Allow reduction of excess assets to achieve eligibility in any retroactive month by (i) designating a \$1500 burial fund for oneself, a spouse and each eligible dependent child and/or (ii) paying for health services costs incurred during the retroactive month.</p>

Name of methodology:

Description:

Allow individuals who are permitted to designate assets for a \$1500 burial fund to make or change that designation within 3 months of the month of application.

Specified Low Income Medicare Beneficiaries

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C. Income Standard Used

Family income must be above 100% FPL and below 120% FPL.

D. Resource Standard Used

The resource standard is the same used to determine eligibility for the Medicare Part D full-benefit low-income subsidy (LIS) (but without regard to the life insurance policy exclusion applied in LIS resource eligibility determinations). This standard is three times the SSI resource standard, adjusted annually in accordance with the consumer price index.

E. Medical Assistance Provided

Medical assistance is limited to payment for Medicare Part B premiums.

Specified Low Income Medicare Beneficiaries

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F. Additional Information (optional)

Medicaid State Plan Eligibility

Eligibility Groups - Mandatory Coverage

Qualifying Individuals

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Individuals with income at or above 120% and below 135% of the FPL who are entitled to Medicare Part A, who qualify for payment of Medicare Part B premiums.

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The state covers the mandatory qualifying individuals group in accordance with the following provisions:

A. Characteristics

Individuals qualifying under this eligibility group must meet all of the following criteria:

1. Would qualify as Qualified Medicare Beneficiaries (described in section 1905(p)(1) of the Act), except that their income exceeds the income level for that eligibility group.
2. Are not otherwise eligible for Medicaid under the state plan.
3. Have income below the income standard and resources at or below the resource standard for this group.

Qualifying Individuals

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B. Financial Methodologies

1. SSI methodologies are used in calculating household income. Please refer as necessary to Non-MAGI Methodologies, completed by the state.

2. Less restrictive methodologies are used in calculating countable income.

- Yes
- No

The less restrictive income methodologies are:

Census Bureau wages are disregarded.

A specified type of income is disregarded:

Description of disregard: Disregard earned income of temporary census employees who were enrolled in Minnesota health care programs on March 1, 2020.

Name of income type:	Description:
Widow or widower(s) disregard	Disregard all RSDI cost of living increases effective January 1, 1984 or later for individuals who meet requirements of section 1634(d).
Pickle disregard	Disregard RSDI cost of living adjustments under the Pickle amendment.
Disabled adult children disregard	Disregard RSDI benefits of disabled adult children who meet requirements of section 1634.
1619(a) and (b) disregard	Disregard income of individuals deemed to be an SSI recipient under 1619(a) or (b).
Community spouse and family allowance disregard	Disregard the community spouse monthly income allowance and family allowance as defined at section 1924(d)(2) and (3) to the extent it is made available to the community spouse and family.
COLA	Disregard the annual cost of living adjustments to RSDI (title II) benefits from January 1 through June 30th of each year.
In-kind income	Disregard all in-kind income.

Name of income type:	Description:
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund.
NIH Study	Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health. Disregard payments made to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2 sections 1 through 3.
State Tax-related Items	Disregard state tax refunds, credits, and rebates.
	Disregard stipends paid to teachers for purposes of training under the READ Act.

3. Less restrictive methodologies are used in calculating countable resources.

Yes

No

The less restrictive resource methodologies are:

General resource disregard:

Real property not otherwise excluded is disregarded.

Name of disregard:	Description:
MSP General Disregard	Disregard the difference between three times the SSI asset limit for an individual, and \$10,000 in non- excluded assets; and the difference between three times the SSI asset limit for a couple, and \$18,000 in non-excluded assets

Description of disregard: Disregard the homestead of a person in a long-term care facility if the home is the residence of the person's (a) sibling living in the home for at least one year immediately before the date of the client's admission to the long term care facility and who has an equity interest in the home; or (b) adult child or grandchild who lived in the home for at least 2 years immediately before the date of the client's admission to the long term care facility and who provided verifiable care to the client to permit the client to live at home instead of the long term care facility.

A specified type of resource is disregarded:

Name of resource type:	Description:
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota Department of Human Services, CN 09-1775 (DWF/FLN).
NIH Study	Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund
COVID-19 Frontline Worker Pay	Disregard payments made to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2 sections 1 through 3.
State Tax-related Items	Disregard from resources state tax refunds, credits, and rebates for 12 months following the month of receipt.
Teacher Stipend	Disregard from resources all stipends paid to teachers for purposes of training under the READ Act.

The following less restrictive methodologies are used:

Name of methodology:	Description:
Asset Reduction	<p>Allow reduction of excess assets to achieve eligibility in the month of application by (i) paying incurred health services expenses for services otherwise covered by Medicaid and/or (ii) reducing excess assets in any manner not considered an uncompensated transfer subject to penalty as defined in state and federal Medicaid law.</p> <p>Allow reduction of excess assets to achieve eligibility in any retroactive month by (i) designating a \$1500 burial fund for oneself, a spouse and each eligible dependent child and/or (ii) paying for health services costs incurred during the retroactive month.</p>

Name of methodology:

Description:

Allow individuals who are permitted to designate assets for a \$1500 burial fund to make or change that designation within 3 months of the month of application.

Qualifying Individuals

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Submission Type	Official	Initial Submission Date	9/30/2024
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Superseded SPA ID	MN-22-0029		
	System-Derived		

C. Income Standard Used

Family income must be at or above 120% FPL and below 135% FPL.

D. Resource Standard Used

The resource standard is the same used to determine eligibility for the Medicare Part D full-benefit low-income subsidy (LIS) (but without regard to the life insurance policy exclusion applied in LIS resource eligibility determinations). This standard is three times the SSI resource standard, adjusted annually in accordance with the consumer price index.

E. Medical Assistance Provided

Medical assistance is limited to payment for Medicare Part B premiums.

Qualifying Individuals

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F. Additional Information (optional)

Medicaid State Plan Eligibility

Eligibility Groups - Options for Coverage

Individuals Eligible for but Not Receiving Cash Assistance

MEDICAID | Medicaid State Plan | Eligibility | MN2024MS0006O | MN-24-0036

Individuals who are eligible for but not receiving federal cash assistance or an optional state supplement.

Package Header

Package ID	MN2024MS0006O	SPA ID	MN-24-0036
Submission Type	Official	Initial Submission Date	9/30/2024
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	System-Derived		

The state covers the optional Individuals Eligible for but Not Receiving Cash Assistance eligibility group in accordance with the following provisions:

A. Characteristics

Individuals qualifying under this eligibility group must meet the following criteria:

1. Meet the eligibility requirements of at least one of the following cash assistance programs:

- a. SSI
- b. Optional State Supplement
- c. AFDC

2. Do not receive cash assistance under these programs.

Individuals Eligible for but Not Receiving Cash Assistance

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B. Individuals Covered

1. The state covers all individuals who meet the characteristics described in section A.

Yes

No

Individuals Eligible for but Not Receiving Cash Assistance

MEDICAID | Medicaid State Plan | Eligibility | MN2024MS0006O | MN-24-0036

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C. Financial Methodologies

1. In calculating household income and resources for individuals who are seeking eligibility on the basis of being 65 years old or older or having blindness or disability, the following methodology is used:

- a. SSI methodologies. Please refer as necessary to Non-MAGI Methodologies, completed by the state.
- b. More restrictive requirements than SSI. Please refer as necessary to More Restrictive Requirements than SSI under 1902(f), completed by the state.

3. Less restrictive methodologies are used in calculating countable income.

- Yes
- No

The less restrictive income methodologies are:

The difference between one income standard and another is disregarded.

- Between the following percentages of the FPL:
- Between the medically needy income limit and a percentage of the FPL:
- Between the SSI Federal Benefit Rate and:
- Between other income standards:

Between this standard: The ABD categorically needy 1902(f) standard

and this standard: 100% FPL, using federal poverty levels in effect on July 1 of each 12 month period.

Census Bureau wages are disregarded.

Description of disregard: Disregard earned income of temporary census employees who were enrolled in Minnesota health care programs on March 1, 2000.

A specified type of income is disregarded:

Name of income type:	Description:
COLA	Disregard the Cost of Living Adjustments to RSDI (title II) benefits from January 1 through June 30th of each year.
In-kind Income	Disregard all in-kind income.
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund.
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota

Name of income type:	<p>Description: Department of Human Services, CN 09-1775 (DWF/FLN).</p> <p>Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health.</p>
Frontline Worker Pay	Disregard payments made to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2 sections 1 through 3.
Teacher Stipend	Disregard stipends paid to teachers for purposes of training under the READ Act.

4. Less restrictive methodologies are used in calculating countable resources.

Yes

No

The less restrictive resource methodologies are:

General resource disregard:

Name of disregard:	<p>Description:</p> <p>For one child living with a disabled or elderly individual, exclude an additional \$3,000, and \$200 for each additional child. For each child living with a disabled or elderly couple, exclude an additional \$200.</p>
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Real property not otherwise excluded is disregarded.

Description of disregard: Disregard the homestead of a person residing in a long term care facility if the home is used as the residence of the person's (a) sibling who lived in the home for at least one year immediately before the date of the client's admission to the long term care facility and who has an equity interest in the home; or (b) an adult child or grandchild who lived in the home for at least two years immediately before the date of the client's admission to the long term care facility and who provided verifiable care to the client to permit the client to live at home instead of the long term care facility.

A specified type of resource is disregarded:

Name of resource type:	Description:
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota Department of Human Services, CN 09-1775 (DWF/FLN).
NIH Study	Disregard as assets any payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health.
Frontline Worker Pay	Disregard any payments to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2, sections 1 through 3, without regard to the manner or period of retention.
Teacher Stipend	Disregard from resources all stipends paid to teachers for purposes of training under the READ Act.

- A beneficiary of a "qualified state long-term care insurance partnership" policy (partnership policy), as defined in section 1917(b)(1)(C) of the Social Security Act and 45 CFR 144.200 et seq., is provided a resource disregard, equal to the amount of the insurance benefit payments made to or on behalf of the individual from the partnership policy.
- The following less restrictive methodologies are used:

Name of methodology:	Description:
Child Assets	Disregard all assets of children under age 21.
Asset Reduction	<p>Allow reduction of excess assets to achieve eligibility in the month of application by (i) paying incurred health service expenses for services otherwise covered by Medicaid and/or (ii) reducing excess assets in any manner not considered an uncompensated transfer subject to penalty as defined in state and federal Medicaid law.</p> <p>Allow reduction of excess assets to achieve eligibility in any retroactive month by (i) designating a \$1500 burial fund for oneself, a spouse and each eligible dependent child and/or (ii) paying for health service costs incurred during</p>

Name of methodology:	Description:
Transition Disregard	<p>the retroactive period.</p> <p>Allow individuals who are permitted to designate assets for a \$1500 burial fund to make or change that designation within three months of the month of application.</p> <p>For a disabled individual ineligible under section 1902(a)(10)(A)(ii)(XIII) due to loss of earnings, and qualifying for Medicaid under another category, continue to disregard for 12 consecutive months the assets allowed and excluded under the employment incentive category of section 1902(a)(10)(A).</p>
Disregard of Employment Incentive Assets Account (EIAA)	<p>Disabled individuals eligible under section 1902(a)(10)(A)(ii)(XIII) will, after 24 months of consecutive enrollment under such section, qualify to establish one or more Employment Incentives Asset Accounts (EIAA). Assets that may be designated as an EIAA include assets such as a savings account, investments, mutual funds, retirement and pension accounts, and medical expense accounts. An EIAA may contain the individual's retirement accounts and medical expense benefits through an employer. An EIAA may contain up to \$17,000 of the individual's other non-excluded liquid assets.</p> <p>An asset disregard will apply, under the following terms:</p> <ol style="list-style-type: none"> 1) The individual shall identify to the state the account(s) that he or she designates as his or her Employment Incentives Assets Account(s) before disenrollment from the group. 2) The value of the assets in the EIAA are disregarded, including growth or appreciation, except that any amount by which the value of the other liquid assets exceeds \$17,000 in an EIAA is not disregarded. 3) Once the assets are designated as an EIAA they are only disregarded when the individual is enrolled in another group for individuals age 65 and older to which the EIAA disregard is applied. 4) If a person's Medicaid eligibility ends at any point before turning age 65, the EIAA will cease to exist. <p>Group to which disregard is applied: Individuals age 65 and older eligible under §1902(f), 1902(a)(10)(A)(ii)(I), 1902(a)(10)(A)(ii)(V), 1902(a)(10)(A)(ii)(VI), 1902(a)(10)(A)(ii)(X), 1902(a)(10)(A)(ii)(XI); medically needy individuals age 65 and older eligible under §1902(a)(10)(C).</p>

Individuals Eligible for but Not Receiving Cash Assistance

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Package Header

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D. Income Standard Used

The income standard used is the standard of the most closely related cash assistance program.

E. Resource Standard Used

The resource standard used is the standard of the most closely related cash assistance program.

Individuals Eligible for but Not Receiving Cash Assistance

MEDICAID | Medicaid State Plan | Eligibility | MN2024MS0006O | MN-24-0036

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F. Additional Information (optional)

Medicaid State Plan Eligibility

Eligibility Groups - Options for Coverage

Individuals Eligible for Cash Except for Institutionalization

MEDICAID | Medicaid State Plan | Eligibility | MN2024MS0006O | MN-24-0036

Individuals who would be eligible for federal cash assistance or an optional state supplement, except for institutionalization.

Package Header

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The state covers the optional Individuals Eligible for Cash Except for Institutionalization eligibility group in accordance with the following provisions:

A. Characteristics

Individuals qualifying under this eligibility group must meet the following criteria:

1. Are in a medical institution.
2. Would meet the eligibility requirements for at least one of the following cash assistance programs, but for the lower income standards used to determine eligibility for institutionalized individuals:
 - a. SSI
 - b. Optional State Supplement
 - c. AFDC

Individuals Eligible for Cash Except for Institutionalization

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B. Individuals Covered

1. The state covers all individuals who meet the characteristics described in section A.

Yes

No

Individuals Eligible for Cash Except for Institutionalization

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C. Financial Methodologies

1. In calculating household income and resources for individuals who are seeking eligibility on the basis of being age 65 or older or having blindness or disability, SSI methodologies are used. Please refer as necessary to Non-MAGI Methodologies, completed by the state.

- a. SSI methodologies. Please refer as necessary to Non-MAGI Methodologies, completed by the state.
- b. More restrictive requirements than SSI. Please refer as necessary to More Restrictive Requirements than SSI under 1902(f), completed by the state.

3. Less restrictive methodologies are used in calculating countable income.

- Yes
- No

The less restrictive income methodologies are:

- The difference between one income standard and another is disregarded.
 - Between the following percentages of the FPL:
 - Between the medically needy income limit and a percentage of the FPL:
 - Between the SSI Federal Benefit Rate and:
 - Between other income standards:

Between this standard: The ABD categorically needy 1902(f) standard
and this standard: 100% FPL, using federal poverty levels in effect on July 1 of each 12 month period.

- Census Bureau wages are disregarded.

Description of disregard: Disregard earned income of temporary census employees who were enrolled in Minnesota health care programs on March 1, 2000.

- A specified type of income is disregarded:

Name of income type:	Description:
COLA	Disregard the Cost of Living Adjustments to RSDI (title II) benefits from January 1 through June 30th of each year.
In-kind Income	Disregard all in-kind income.
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund.
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota

Name of income type:	Description:
NIH Study	Department of Human Services, CN 09-1775 (DWF/FLN). Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health.
Frontline Worker Pay	Disregard payments made to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2 sections 1 through 3.
State Tax-related Items	Disregard any state tax refunds, credits, and rebates.
Teacher Stipend	Disregard stipends paid to teachers for purposes of training under the READ Act.

4. Less restrictive methodologies are used in calculating countable resources.

Yes

No

The less restrictive resource methodologies are:

General resource disregard:

Real property not otherwise excluded is disregarded.

A specified type of resource is disregarded:

Name of disregard:	Description:
Disregard for Children Living with Adults	For one child living with a disabled or elderly individual, exclude an additional \$3,000, and \$200 for each additional child. For each child living with a disabled or elderly couple, exclude an additional \$200.

Description of disregard: Disregard the homestead of a person residing in a long term care facility if the home is used as the residence of the person's (a) sibling who lived in the home for at least one year immediately before the date of the client's admission to the long term care facility and who has an equity interest in the home; or (b) an adult child or grandchild who lived in the home for at least two years immediately before the date of the client's admission to the long term care facility and who provided verifiable care to the client to permit the client to live at home instead of the long term care facility.

Medicaid State Plan Print View

Name of resource type:	Description:
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Funds.
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota Department of Human Services, CN 09-1775 (DWF/FLN).
NIH Study	Disregard as assets any payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health.
Frontline Worker Pay	Disregard any payments to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2, sections 1 through 3, without regard to the manner or period of retention.
State Tax-related Items	Disregard from resources state tax refunds, credits, and rebates for 12 months following the month of receipt.
Teacher Stipends	Disregard from resources all stipends paid to teachers for purposes of training under the READ Act.

A beneficiary of a "qualified state long-term care insurance partnership" policy (partnership policy), as defined in section 1917(b)(1)(C) of the Social Security Act and 45 CFR 144.200 et seq., is provided a resource disregard, equal to the amount of the insurance benefit payments made to or on behalf of the individual from the partnership policy.

The following less restrictive methodologies are used:

Name of methodology:	Description:
Child Assets	Disregard all assets of children under age 21.
Asset Reduction	Allow reduction of excess assets to achieve eligibility in the month of application by (i) paying incurred health service expenses for services otherwise covered by Medicaid and/or (ii) reducing excess assets in any manner not considered an uncompensated transfer subject to penalty as defined in state and federal Medicaid law.
	Allow reduction of excess assets to achieve eligibility in any retroactive month by (i) designating a \$1500 burial fund for oneself, a spouse and each eligible dependent child and/or (ii) paying for health service costs incurred during

Name of methodology:

Description:

the retroactive period.

Allow individuals who are permitted to designate assets for a \$1500 burial fund to make or change that designation within three months of the month of application.

Transition Disregard

For a disabled individual ineligible under section 1902(a)(10)(A)(ii)(XIII) due to loss of earnings, and qualifying for Medicaid under another category, continue to disregard for 12 consecutive months the assets allowed and excluded under the employment incentive category of section 1902(a)(10)(A).

Disabled individuals eligible under section 1902(a)(10)(A)(ii)(XIII) will, after 24 months of consecutive enrollment under such section, qualify to establish one or more Employment Incentives Asset Accounts (EIAA). Assets that may be designated as an EIAA include assets such as a savings account, investments, mutual funds, retirement and pension accounts, and medical expense accounts. An EIAA may contain the individual's retirement accounts and medical expense benefits through an employer. An EIAA may contain up to \$17,000 of the individual's other non-excluded liquid assets.

An asset disregard will apply, under the following terms:

- 1) The individual shall identify to the state the account(s) that he or she designates as his or her Employment Incentives Assets Account(s) before disenrollment from the group.
- 2) The value of the assets in the EIAA are disregarded, including growth or appreciation, except that any amount by which the value of the other liquid assets exceeds \$17,000 in an EIAA is not disregarded.
- 3) Once the assets are designated as an EIAA they are only disregarded when the individual is enrolled in another group for individuals age 65 and older to which the EIAA disregard is applied.
- 4) If a person's Medicaid eligibility ends at any point before turning age 65, the EIAA will cease to exist.

Disregard of Employment Incentive Assets Account (EIAA)

Group to which disregard is applied: Individuals age 65 and older eligible under §1902(f), 1902(a)(10)(A)(ii)(I), 1902(a)(10)(A)(ii)(V), 1902(a)(10)(A)(ii)(VI), 1902(a)(10)(A)(ii)(X), 1902(a)(10)(A)(ii)(XI); medically needy individuals age 65 and older eligible under §1902(a)(10)(C).

Individuals Eligible for Cash Except for Institutionalization

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D. Income Standard Used

The income standard used is the standard of the most closely related cash assistance program.

E. Resource Standard Used

The resource standard used is the standard of the most closely related cash assistance program.

Individuals Eligible for Cash Except for Institutionalization

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F. Additional Information (optional)

Medicaid State Plan Eligibility

Eligibility Groups - Medically Needy

Medically Needy Reasonable Classifications of Individuals under Age 21

MEDICAID | Medicaid State Plan | Eligibility | MN2024MS0006O | MN-24-0036

One or more reasonable classifications of individuals under age 21 who do not qualify as categorically needy.

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The state covers the optional Medically Needy Reasonable Classifications of Individuals under Age 21 eligibility group in accordance with the following provisions:

A. Characteristics

Individuals qualifying under this eligibility group must meet the following criteria:

1. Are under age 21, or a lower age, as specified in section C.
2. Would not qualify under the Medically Needy Children under Age 18 eligibility group (42 CFR 435.301)
3. Are not otherwise eligible for categorically needy coverage under the state plan.
4. Have income at or below the medically needy income level and resources at or below the medically needy resource level.

Medically Needy Reasonable Classifications of Individuals under Age 21

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B. Individuals Covered

The state covers the following populations:

1. All children under a specified age limit:
2. Reasonable classifications of children

Name of classification	Age Range
Child with a disability under section 1902(e)(3)	Under age 19
Child with a disability eligible for HCBS	Under age 21
Child in state-funded fostercare/kinship	Under age 21
Name: Child with a disability under section 1902(e)(3) Age Covered: Under age 19	Description: Child with a disability meeting TEFRA requirements under section 1902(e)(3), with excess income.
Name: Child with a disability eligible for HCBS Age Covered: Under age 21	Description: Child with a disability eligible for home and community-based waiver services under section 1915(c) using institutional rules, with excess income
Name: Child in state-funded fostercare/kinship Age Covered: Under age 21	Description: Child under age 21 who is not eligible for Title IV-E of the Social Security Act, but is eligible for foster care or kinship assistance under a state-funded program, is eligible without an income test.

Medically Needy Reasonable Classifications of Individuals under Age 21

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C. Financial Methodologies

1. The state uses the same financial methodology for all individuals covered.

Yes

No

2. The financial methodologies are:

Child in state-funded fostercare/kinship

The financial methodology used is:

- a. AFDC methodologies. Please refer as necessary to Non-MAGI Methodologies, completed by the state.
- b. MAGI-like methodologies. Please refer as necessary to Non-MAGI Methodologies, completed by the state.

3. Less restrictive methodologies are used in calculating countable income.

Yes

No

The less restrictive income methodologies are:

All income is disregarded. No income test is applied.

4. Less restrictive methodologies are used in calculating countable resources.

Yes

No

The less restrictive resource methodologies are:

All resources are disregarded. No resource test is applied.

Child with a disability eligible for HCBS

The financial methodology used is:

- a. AFDC methodologies. Please refer as necessary to Non-MAGI Methodologies, completed by the state.
- b. MAGI-like methodologies. Please refer as necessary to Non-MAGI Methodologies, completed by the state.

3. Less restrictive methodologies are used in calculating countable income.

Yes

No

The less restrictive income methodologies are:

The difference between one income standard and another is disregarded.

Between the following percentages of the FPL:

Between the medically needy income limit and a percentage of the FPL:

Between the SSI Federal Benefit Rate and:

Between other income standards:

Between this standard: The medically needy income standard by family size

and this standard:

- 70% FPL, effective July 1, 2001
- 75% FPL, effective July 1, 2002
- 80% FPL, effective July 1, 2016
- 81% FPL, effective June 1, 2019
- 100% FPL, effective July 1, 2022

Description of disregard: Disregard earned income of temporary census employees who were enrolled in Minnesota health care programs on March 1, 2000.

Census Bureau wages are disregarded.

A specified type of income is disregarded:

Name of income type:	Description:
COLA	Disregard the Cost of Living Adjustments to RSDI (title II) benefits from January 1 through June 30th of each year.
In-kind Income	Disregard all in-kind income.
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund.
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota Department of Human Services, CN 09-1775 (DWF/FLN).
NIH Study	Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health.
Frontline Worker Payments	Disregard payments made to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2 sections 1 through 3.
State Tax Items	Disregard all state tax refunds, credits and rebates.

4. Less restrictive methodologies are used in calculating countable resources.

Yes

No

The less restrictive resource methodologies are:

All resources are disregarded. No resource test is applied.

Child with a disability under section 1902(e)(3)

The financial methodology used is:

- a. AFDC methodologies. Please refer as necessary to Non-MAGI Methodologies, completed by the state.
- b. MAGI-like methodologies. Please refer as necessary to Non-MAGI Methodologies, completed by the state.

3. Less restrictive methodologies are used in calculating countable income.

Yes

No

The less restrictive income methodologies are:

The difference between one income standard and another is disregarded.

Between the following percentages of the FPL:

Between the medically needy income limit and a percentage of the FPL:

Between the SSI Federal Benefit Rate and:

Between other income standards:

Between this standard: The medically needy income standard by family size

and this standard: 70% FPL, effective July 1, 2001

75% FPL, effective July 1, 2002

80% FPL, effective July 1, 2016

81% FPL, effective June 1, 2019

100% FPL, effective July 1, 2022

Census Bureau wages are disregarded.

Description of disregard: Disregard earned income of temporary census employees who were enrolled in Minnesota health care programs on March 1, 2000.

A specified type of income is disregarded:

Name of income type:	Description:
In-kind Income	Disregard all in-kind income.
COLA	Disregard the Cost of Living Adjustments to RSDI (title II) benefits from January 1 through June 30th of each year.
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota Department of Human Services, CN 08-1775 (DWF/FLN).
NIH Study	Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health.
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund.

The following less restrictive methodologies are used:

Name of methodology:

Description:

Child support

Disregard payments of child support from the child's income.

Title II benefits

Disregard from the child's income payments of RSDI (title II) benefits.

4. Less restrictive methodologies are used in calculating countable resources.

Yes

No

The less restrictive resource methodologies are:

All resources are disregarded. No resource test is applied.

Medically Needy Reasonable Classifications of Individuals under Age 21

MEDICAID | Medicaid State Plan | Eligibility | MN2024MS0006O | MN-24-0036

Package Header

Package ID	MN2024MS0006O	SPA ID	MN-24-0036
Submission Type	Official	Initial Submission Date	9/30/2024
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Superseded SPA ID	MN-22-0009		
	System-Derived		

D. Income Standard Used

The income standard used for this group is described in the Medically Needy Income Level RU.

E. Resource Standard Used

The resource standard used for this group is described in the Medically Needy Resource Level RU.

F. Spenddown

The state allows individuals to deduct incurred medical and remedial expenses (spend down) to become eligible under this group. Spenddown is defined in the Handling of Excess Income (Spenddown) RU.

Medically Needy Reasonable Classifications of Individuals under Age 21

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G. Additional Information (optional)

Medicaid State Plan Eligibility

Eligibility Groups - Medically Needy

Medically Needy Populations Based on Age, Blindness or Disability

MEDICAID | Medicaid State Plan | Eligibility | MN2024MS0006O | MN-24-0036

Individuals who are age 65 or older or who have blindness or a disability who do not qualify as categorically needy.

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The state covers the optional Medically Needy Populations Based on Age, Blindness or Disability eligibility group in accordance with the following provisions:

A. Characteristics

Individuals qualifying under this eligibility group must meet the following criteria:

1. Meet at least one of the following:
 - a. Are age 65 or older;
 - b. Have blindness; or
 - c. Have a disability.
2. Are not otherwise eligible for categorically needy coverage under the state plan.
3. Have income at or below the medically needy income level and resources at or below the medically needy resource level.

Medically Needy Populations Based on Age, Blindness or Disability

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B. Individuals Covered

The state covers the following populations:

1. Individuals age 65 or older
2. Individuals with blindness
3. Individuals who have a disability

Medically Needy Populations Based on Age, Blindness or Disability

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C. Financial Methodologies

1. The state uses the same financial methodology for all individuals covered.

Yes

No

2. The financial methodology used is:

- a. SSI methodologies. Please refer as necessary to Non-MAGI Methodologies, completed by the state.
- b. More restrictive requirements than SSI. Please refer as necessary to More Restrictive Requirements than SSI under 1902(f), completed by the state.
- c. Less restrictive methodologies are used in calculating countable income.

Yes No

The less restrictive income methodologies are:

The difference between one income standard and another is disregarded.

Between the following percentages of the FPL:

Between the medically needy income limit and a percentage of the FPL:

Between the SSI Federal Benefit Rate and:

Between other income standards:

Between this standard: The medically needy income standard by family size

and this standard:

- 70% FPL, effective July 1, 2001
- 75% FPL, effective July 1, 2002
- 80% FPL, effective July 1, 2016
- 81% FPL, effective June 1, 2019
- 100% FPL, effective July 1, 2022

Census Bureau wages are disregarded.

Description of disregard: Disregard earned income of temporary census employees who were enrolled in Minnesota health care programs on March 1, 2000.

A specified type of income is disregarded:

Name of income type:	Description:
COLA	Disregard the Cost of Living Adjustments to RSDI (title II) benefits from January 1 through June 30th of each year.
In-kind Income	Disregard all in-kind income.

Name of income type:	Description:
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund.
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota Department of Human Services, CN 09-1775 (DWF/FLN).
NIH Study	Disregard payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health.
Frontline Worker Payments	Disregard payments made to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2 sections 1 through 3.
State Tax Items	Disregard all state tax refunds, credits and rebates
Teacher Stipend	Disregard stipends paid to teachers for purposes of training under the READ Act.

d. Less restrictive methodologies are used in calculating countable resources.

Yes No

The less restrictive resource methodologies are:

General resource disregard:

Name of disregard:	Description:
Disregard for Children Living with Adults	For one child living with a disabled or elderly individual, exclude an additional \$3,000, and \$200 for each additional child. For each child living with a disabled or elderly couple, exclude an additional \$200.

Real property not otherwise excluded is disregarded.

Description of disregard: Disregard the homestead of a person residing in a long term care facility if the

home is used as the residence of the person's (a) sibling who lived in the home for at least one year immediately before the date of the client's admission to the long term care facility and who has an equity interest in the home; or (b) an adult child or grandchild who lived in the home for at least two years immediately before the date of the client's admission to the long term care facility and who provided verifiable care to the client to permit the client to live at home instead of the long term care facility

A specified type of resource is disregarded:

Name of resource type:	Description:
State Catastrophe Funds	Disregard payments from the Minnesota I-35 Catastrophe Relief Fund.
Jensen Settlement	Disregard payments to class members under the federal court order in Jensen et al v. Minnesota Department of Human Services, CN 09-1775 (DWF/FLN).
NIH Study	Disregard as assets any payments made to parents participating in the "income and child development in the first three years of life" demonstration project funded by the United States Department of Health and Human Services' National Institutes of Health.
Frontline Worker Pay	Disregard any payments to workers on the frontline during the COVID-19 peacetime emergency declared by the governor in 2020, authorized under 2022 Laws of Minnesota, chapter 50, article 2, sections 1 through 3, without regard to the manner or period of retention.
State Tax-related Items	Disregard from resources state tax refunds, credits, and rebates for 12 months following the month of receipt.
Teacher Stipend	Disregard from resources all stipends paid to teachers for

Name of resource type:

Description:

purposes of training under the READ Act.

A beneficiary of a "qualified state long-term care insurance partnership" policy (partnership policy), as defined in section 1917(b)(1)(C) of the Social Security Act and 45 CFR 144.200 et seq., is provided a resource disregard, equal to the amount of the insurance benefit payments made to or on behalf of the individual from the partnership policy.

The following less restrictive methodologies are used:

Name of methodology:

Description:

Disregard of Employment Incentive Assets Account (EIAA)

Disabled individuals eligible under section 1902(a)(10)(A)(ii)(XIII) will, after 24 months of consecutive enrollment under such section, qualify to establish one or more Employment Incentives Asset Accounts (EIAA). Assets that may be designated as an EIAA include assets such as a savings account, investments, mutual funds, retirement and pension accounts, and medical expense accounts. An EIAA may contain the individual's retirement accounts and medical expense benefits through an employer. An EIAA may contain up to \$17,000 of the individual's other non-excluded liquid assets. An asset disregard will apply, under the following terms:

- 1) The individual shall identify to the state the account(s) that he or she designates as his or her Employment Incentives Assets Account(s) before disenrollment from the group.
- 2) The value of the assets in the EIAA are disregarded, including growth or appreciation, except that any amount by which the value of the other liquid assets exceeds \$17,000 in an EIAA is not disregarded.
- 3) Once the assets are designated as an EIAA they are only disregarded when the individual is enrolled in another group for individuals age 65 and older to which the EIAA disregard is applied.
- 4) If a person's Medicaid eligibility ends at any point before turning age 65, the EIAA will cease to exist.

Name of methodology:	Description:
Disregard Assets of a Spouse	<p>Group to which disregard is applied: Individuals age 65 and older eligible under §1902(f), 1902(a)(10)(A)(ii) (I), 1902(a)(10)(A)(ii)(V), 1902(a)(10)(A)(ii) (VI), 1902(a)(10)(A)(ii) (X), 1902(a)(10) (A)(ii) (XI); medically needy individuals age 65 and older eligible under §1902(a)(10)(C).</p> <p>For married individuals eligible as medically needy for home and community-based services in the Brain Injury (BI), Community Alternative Care (CAC), Community Access for Disability Inclusion (CADL), or Developmental Disability (DD) waivers, disregard all assets of the spouse during any period in which the financial methodologies of Section 2404 of the Affordable Care Act mandatorily apply.</p>
Asset Reduction	<p>Allow reduction of excess assets to achieve eligibility in the month of application by (i) paying incurred health service expenses for services otherwise covered by Medicaid and/or (ii) reducing excess assets in any manner not considered an uncompensated transfer subject to penalty as defined in state and federal Medicaid law.</p> <p>Allow reduction of excess assets to achieve eligibility in any retroactive month by (i) designating a \$1500 burial fund for oneself, a spouse and each eligible dependent child and/or (ii) paying for health service costs incurred during the retroactive period.</p>
Child Assets	<p>Allow individuals who are permitted to designate assets for a \$1500 burial fund to make or change that designation within three months of the month of application.</p> <p>Disregard all assets of children under age 21.</p>

Name of methodology:

Description:

Transition Disregard

For a disabled individual ineligible under section 1902(a)(10)(A)(ii)(XIII) due to loss of earnings, and qualifying for Medicaid under another category, continue to disregard for 12 consecutive months the assets allowed and excluded under the employment incentive category of section 1902(a)(10) (A).

Medically Needy Populations Based on Age, Blindness or Disability

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D. Income Standard Used

The income standard used for this group is described in the Medically Needy Income Level RU.

Medically Needy Populations Based on Age, Blindness or Disability

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E. Resource Standard Used

The resource standard used for this group is described in the Medically Needy Resource Level RU.

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F. Spenddown

The state allows individuals to deduct incurred medical and remedial expenses (spend down) to become eligible under this group. Spenddown is defined in the Handling of Excess Income (Spenddown) RU.

Medically Needy Populations Based on Age, Blindness or Disability

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G. Additional Information (optional)

PRA Disclosure Statement: Centers for Medicare & Medicaid Services (CMS) collects this mandatory information in accordance with (42 U.S.C. 1396a) and (42 CFR 430.12); which sets forth the authority for the submittal and collection of state plans and plan amendment information in a format defined by CMS for the purpose of improving the state application and federal review processes, improve federal program management of Medicaid programs and Children's Health Insurance Program, and to standardize Medicaid program data which covers basic requirements, and individualized content that reflects the characteristics of the particular state's program. The information will be used to monitor and analyze performance metrics related to the Medicaid and Children's Health Insurance Program in efforts to boost program integrity efforts, improve performance and accountability across the programs. Under the Privacy Act of 1974 any personally identifying information obtained will be kept private to the extent of the law. According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0938-1188. The time required to complete this information collection is estimated to range from 1 hour to 80 hours per response (see below), including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: CMS, 7500 Security Boulevard, Attn: PRA Reports Clearance Officer, Mail Stop C4-26-05, Baltimore, Maryland 21244-1850.

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