

SSI-R Unwind Chart

Income and Resources

	<i>Resource Test</i>	<i>Income Test</i>	<i>AVS</i>	<i>Lookback</i>
<i>Renewal</i>	No	Yes ¹ , document current for NH or attest, as applicable	No	No
<i>New Application</i>	Yes ² , attest or document current, as applicable	Yes, document	Yes ³	Yes, NH coverage
<i>Increase in Coverage – CB No LTC to CBLTC</i>	No	Yes, current budget or update w/attestation, if appropriate	No	N/A
<i>Increase in Coverage – Community Coverage or NYSOH referral to Coverage of NH Care</i>	Yes, document	Yes, document	Yes	Yes
<i>Referrals from NYSOH for CBLTC</i>	No	Yes, document	No	N/A
<i>Referrals from NYSOH - Excess Income</i>	No	Yes, document	No	N/A
<i>MSP only/QI to MA Coverage</i>	Yes, attest or document current, as applicable	Yes, current budget or update w/attestation, if appropriate	Yes	Yes, NH coverage

¹ “Renewal Simplifications for Medicaid and Family Health Plus Recipients” – 08 OHIP/ADM-4

² “Resource Documentation Requirements for Medicaid Applicant/Recipients (Attestation of Resources)” – 04 OMM/ADM-6

³ “Asset Verification System” – 17 OHIP/ADM-02

Change in Circumstance

	<i>Prior to Full Renewal</i>	<i>At Full Renewal</i>	<i>After Full Renewal</i>
<i>Reported Change - Income</i>	<ul style="list-style-type: none"> Budget only if benefit to consumer, accept attestation 	<ul style="list-style-type: none"> Regular rules apply. See "Renewal" above. NAMI changes apply prospectively No NAMI reconciliation 	<ul style="list-style-type: none"> Regular rules apply, even if income obligation increases. NAMI reconciliation permitted
<i>Reported Change - Resources</i>	<ul style="list-style-type: none"> Resource test waived throughout unwind period 	<ul style="list-style-type: none"> Resource test waived throughout unwind period 	<ul style="list-style-type: none"> Resource test waived throughout unwind period.
<i>Reported Change - Other (other than: moved out of state, death of the individual, client request to close)</i>	<ul style="list-style-type: none"> Budget only if benefit to consumer, accept attestation* 	<ul style="list-style-type: none"> Regular rules apply Apply any income changes prospectively 	<ul style="list-style-type: none"> Regular rules apply

Note:

Spousal impoverishment ceases the month following the month of the CS's death. NAMI adjusted prospectively. No NAMI reconciliation.

Living arrangement changes for a couple from congregate care to community – use Medically Needy income level.