

April 8, 2009 Summary of Changes

Chapter	Passage	Summary
Intro		Removed reference to Chapter 2800.
0400	0410.0106, 0420.0106, 0430.0106, 0440.0106, 0450.0106, 0460.0106	Cases to be maintained in a confidential caseload updated.
	0440.0612	Added new passage for Community Spouse Resource Allowance.
0600	0610.0102, 0610.0200, 0610.0300	Updated simplified reporting policy changes including the elimination of non-simplified reporting due to the 2008 Farm Bill.
0800	0810.0200, 0810.0300, 0810.0400, 0810.0401, 0810.0501, 0810.0504	Updated simplified reporting policy changes including the elimination of non-simplified reporting due to the 2008 Farm Bill.
1400	1420.0509.02, 1420.0509.03	Removed reference to specific forms.
	1430.0103	Due to the Children's Health Insurance Program Reauthorization Act (CHIPRA), language was added to exempt presumptively eligible newborns from the citizenship and identity verification requirement.
1600	1640.0205	Updated asset limit content.
	1640.0305.03	Added language on enhanced life estate.
	1640.0307.01, 1640.0307.03	Added information on home equity policy.
	1640.0307.04 1640.0307.05 1640.0307.06	Added new passages: Home Equity; Undue Hardship for Excess Home Equity Interest; Processing Undue Hardship Requests for Excess Home Equity
	1640.0505.04, 1640.0505.05	Updated retirement funds policy.
	1640.0534	Added a reference to home equity.
	1640.0561.02 1640.0561.03	Updated to substitute mortgage for property agreement. Defined criteria that must be met for the promissory note, loan or mortgage to be considered a transfer of assets without fair compensation.
	1640.0561.04	Re-titled passage to Home Equity Plans and included information on home equity loans and home equity lines of credit.
	1640.0576.09	Updated where to send or fax a copy of the approved qualified disabled or pooled trust.
	1640.0582.01	Clarified tax assessments cannot be used to help determine the amount of home equity if the assessed value of the home exceeds \$450,000.

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	1640.0594	Added new passage for Long-Term Care Insurance Partnership Payments.
	1640.0595	Added new passage for Continuing Care Entrance Fee.
	1640.0606	Re-titled and updated Transfer of Assets and Income content.
	1640.0609.01	Re-titled and updated Identifying Potential Transfers of Assets or Income content.
	1640.0609.02	Re-titled and updated policy on Transfers to Annuities Occurring Prior to 11/1/07.
	1640.0609.03	Re-titled and new contents on Transfers to Annuities on or After 11/1/07.
	1640.0609.03, 1640.0609.04, 1640.0609.05, 1640.0609.06	Contents moved and passages renumbered to 1640.0609.04, 1640.0609.05, 1640.0609.06 and 1640.0609.07.
	1640.0609.06	Updated the passage about transfer vs. countable asset.
	1640.0611	Updated transfers by community spouse content.
	1640.0613	Updated processing transfer cases content.
	1640.0616	Updated rebuttal criteria content.
	1640.0617	Re-titled and new contents on Undue Hardship.
	1640.0613.01, 1640.0613.02	Added new passages for Property Transferred and Life Estate Retained; Purchase of Life Estate.
	1640.0614.03	Updated compensation in property and removed life estate content.
	1640.0618, 1640.0619	Updated the passage about pre and post-DRA transfer policy.
	1640.0620, 1640.0621	Updated and clarified adjustments to penalty period and case recording of transfers.
	1640.0623	Added information on home equity and clarified denial of nursing facilities services applies to HCBS.
1800	1810.0824	Updated to indicate TCA is the income of the adult who must be the payee.
	1840.0110	Clarified policy and updated where to send or fax a copy of the approved qualified income trust.
	1840.1010	Re-titled passage to Home Equity Plans and included information on home equity loans, home equity lines of credit and transfer of assets policy for proceeds of a home equity plan.
2000	2030.0301.01, 2030.0301.02, 2030.0301.03	Passage numbers deleted and renumbered to 2030.0302, 2030.0303 and 2030.0304.
	2030.0302, 2030.0303	Passages renumbered to 2030.0310 and 2030.0314.

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	2030.0302.01, 2030.0302.02, 2030.0302.03	Passage numbers deleted and renumbered to 2030.0311, 2030.0312 and, 2030.0313.
	2030.0305, 2030.0306, 2030.0307,2030.0308, 2030.0309	Added new passages for periodic reporting policy.
	2030.0900	Due to CHIPRA, language was added to exempt presumptively eligible newborns from the citizenship and identity verification requirement.
2200	2210.0317.03, 2210.0318.03	Updated simplified reporting policy changes including the elimination of non-simplified reporting due to the 2008 Farm Bill.
2400	2420.0315	Removed #4 and #5 as these involve calculating the benefit amount and not eligibility for the \$200 and ½ disregard.
2600	2610.0203.02	Added language indicating sponsored noncitizens may self-declare non-support from the sponsor.
2800	2830.0000 – 2830.0507	Entire chapter removed. Refer to chapter 2000 for remaining periodic reporting policy.
3000	3010.0102	Updated simplified reporting policy changes including the elimination of non-simplified reporting due to the 2008 Farm Bill.
4600	Glossary	Added Continuing Care Retirement Community.
Appendix	A-8	Re-titled and updated steps for pre and post-DRA transfer process.
	A-34	Added new appendix for Guideline for Evaluating Annuities.