

TO: Local District Commissioners, Medicaid Directors

FROM: Judith Arnold, Director
Division of Eligibility and Marketplace Integration

SUBJECT: Applying for Entitlement Benefits

EFFECTIVE DATE: Immediately

CONTACT PERSON: Local District Support Units
Upstate (518) 474-8887 NYC (212) 417-4500

The purpose of this General Information System (GIS) message is to clarify Medicaid policy regarding the requirement to apply for entitlement benefits.

Medicaid applicants/recipients (A/R) who are eligible for or reasonably appear to meet the eligibility criteria for an entitlement benefit, which would reduce or eliminate the need for assistance and care, are required to apply for and fully utilize such benefits. Unemployment Insurance Benefits (UIB) and Social Security Retirement, Survivors', and Disability Insurance (RSDI), are examples of entitlement benefits. For example, if someone has zero income but also discloses that he/she has a work history and recently lost a job, requiring the A/R to apply for UIB would be appropriate. If an A/R indicates zero income and he/she is disabled and unable to work, applying for Social Security Disability benefits would be an appropriate referral.

It has been brought to the attention of the Department of Health (DOH) that A/R's have been required to apply for Social Security retirement benefits due to the fact that they are age 62 or older, even if they are still working full time. With the increase in the retirement age for full Social Security retirement benefits, many individuals are delaying retirement and continue to work full time. When an A/R is still working full time, districts must not require the A/R to apply for Social Security Retirement benefits. Full-time employment or part-time employment is a matter generally to be determined by the employer. The district is to accept the A/R's attestation as to whether he or she works part time or full time. This policy is applicable to all Medicaid programs.

Please direct any questions to your local district liaison.