

STATE OF NEW YORK

4881--A

2023-2024 Regular Sessions

IN SENATE

February 16, 2023

Introduced by Sen. CLEARE -- read twice and ordered printed, and when printed to be committed to the Committee on Health -- committee discharged, bill amended, ordered reprinted as amended and recommitted to said committee

AN ACT to amend the social services law, in relation to increasing the amount of the savings exemption for eligibility for Medicaid and eliminating the asset test for certain individuals; and to repeal certain provisions of such law relating thereto

The People of the State of New York, represented in Senate and Assembly, do enact as follows:

Section 1. Subparagraph 4 of paragraph (a) of subdivision 2 of section 366 of the social services law, as amended by section 43 of part C of chapter 58 of the laws of 2008, is amended to read as follows:

(4) savings in amounts equal to ~~[one hundred fifty percent of the income amount permitted under subparagraph seven of this paragraph, provided, however, that the amounts for one and two person households shall not be less than the amounts permitted to be retained by households of the same size in order to qualify for benefits under the federal supplemental security income program]~~ three hundred thousand dollars;

§ 1-a. Subparagraph 4 of paragraph (a) of subdivision 2 of section 366 of the social services law, as amended by section 3 of part AAA of chapter 56 of the laws of 2022, is amended to read as follows:

(4) savings in amounts equal to ~~[one hundred fifty percent of the income amount permitted under subparagraph seven of this paragraph, provided, however, that the amounts for one and two person households shall not be less than the amounts permitted to be retained by households of the same size in order to qualify for benefits under the federal supplemental security income program]~~ three hundred thousand dollars;

§ 2. Subparagraph 5 of paragraph (c) of subdivision 1 of section 366 of the social services law, as amended by chapter 583 of the laws of 2023, is amended to read as follows:

EXPLANATION--Matter in italics (underscored) is new; matter in brackets ~~[-]~~ is old law to be omitted.

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(5) A disabled individual at least sixteen years of age, but under the age of sixty-five, who: would be eligible for benefits under the supplemental security income program but for earnings in excess of the allowable limit; has net available income that does not exceed two hundred fifty percent of the applicable federal income official poverty line, as defined and updated by the United States department of health and human services, for a one-person or two-person household, as defined by the commissioner in regulation; has household resources, as defined in paragraph (e) of subdivision two of section three hundred sixty-six-c of this title, other than retirement accounts, that do not exceed ~~[one hundred fifty percent of the income amount permitted under subparagraph seven of paragraph (a) of subdivision two of this section, for a one person or two person household]~~ three hundred thousand dollars, as defined by the commissioner in regulation; and contributes to the cost of medical assistance provided pursuant to this subparagraph in accordance with subdivision twelve of section three hundred sixty-seven-a of this title; for purposes of this subparagraph, disabled means having a medically determinable impairment of sufficient severity and duration to qualify for benefits under section 1902(a)(10)(A)(ii)(xv) of the social security act.

§ 3. Subparagraphs 2, 3 and 4 of paragraph (a) of subdivision 2 of section 366 of the social services law are REPEALED.

§ 4. Subparagraphs 5, 6, 7, 9, 10 and 11 of paragraph (a) of subdivision 2 of section 366 of the social services law, subparagraph 5 as amended by chapter 576 of the laws of 2007, subparagraph 6 as amended by chapter 938 of the laws of 1990, subparagraph 7 as amended by section 47 of part C of chapter 58 of the laws of 2008, subparagraph 9 as amended by chapter 110 of the laws of 1971, subparagraph 10 as added by chapter 705 of the laws of 1988, clauses (i) and (ii) of subparagraph 10 as amended by chapter 672 of the laws of 2019, clause (iii) of subparagraph 10 as amended by chapter 170 of the laws of 1994 and subparagraph 11 as added by chapter 576 of the laws of 2015, are renumbered subparagraphs 2, 3, 4, 5, 6 and 7 and clause (iii) of subparagraph 4 is amended to read as follows:

(iii) No other income ~~[or resources]~~, including federal old-age, survivors and disability insurance, state disability insurance or other payroll deductions, whether mandatory or optional, shall be exempt and all other income ~~[and resources]~~ shall be taken into consideration and required to be applied toward the payment or partial payment of the cost of medical care and services available under this title, to the extent permitted by federal law.

§ 4-a. Subparagraphs 5, 6, 7, 8, 9, 10 and 11 of paragraph (a) of subdivision 2 of section 366 of the social services law, as amended by section 3 of part AAA of chapter 56 of the laws of 2022, are renumbered subparagraphs 2, 3, 4, 5, 6, 7 and 8 and subparagraph 5 is amended to read as follows:

(5) No other income ~~[or resources]~~, including federal old-age, survivors and disability insurance, state disability insurance or other payroll deductions, whether mandatory or optional, shall be exempt and all other income ~~[and resources]~~ shall be taken into consideration and required to be applied toward the payment or partial payment of the cost of medical care and services available under this title, to the extent permitted by federal law.

§ 5. Subparagraphs 2, 5 and 10 of paragraph (c) of subdivision 1 of section 366 of the social services law, subparagraphs 2 and 10 as added by section 1 of part D of chapter 56 of the laws of 2013 and subpara-

1 graph 5 as amended by section two of this act, are amended to read as
2 follows:

3 (2) An individual who, although not receiving public assistance or
4 care for his or her maintenance under other provisions of this chapter,
5 has income [~~and resources~~], including available support from responsible
6 relatives, that does not exceed the amounts set forth in paragraph (a)
7 of subdivision two of this section, and is (i) sixty-five years of age
8 or older, or certified blind or certified disabled or (ii) for reasons
9 other than income [~~or resources~~], is eligible for federal supplemental
10 security income benefits and/or additional state payments.

11 (5) A disabled individual at least sixteen years of age, but under the
12 age of sixty-five, who: would be eligible for benefits under the supple-
13 mental security income program but for earnings in excess of the allow-
14 able limit; has net available income that does not exceed two hundred
15 fifty percent of the applicable federal income official poverty line, as
16 defined and updated by the United States department of health and human
17 services, for a one-person or two-person household, as defined by the
18 commissioner in regulation; [~~has household resources, as defined in
19 paragraph (e) of subdivision two of section three hundred sixty-six-c of
20 this title, other than retirement accounts, that do not exceed three
21 hundred thousand dollars, as defined by the commissioner in regulation;
22 and contributes to the cost of medical assistance provided pursuant to
23 this subparagraph in accordance with subdivision twelve of section three
24 hundred sixty-seven-a of this title;~~] for purposes of this subparagraph,
25 disabled means having a medically determinable impairment of sufficient
26 severity and duration to qualify for benefits under section
27 1902(a)(10)(A)(ii)(xv) of the social security act.

28 (10) A resident of a home for adults operated by a social services
29 district, or a residential care center for adults or community residence
30 operated or certified by the office of mental health, and has not,
31 according to criteria promulgated by the department consistent with this
32 title, sufficient income, or in the case of a person sixty-five years of
33 age or older, certified blind, or certified disabled, sufficient income
34 [~~and resources~~], including available support from responsible relatives,
35 to meet all the costs of required medical care and services available
36 under this title.

37 § 6. Subparagraphs 1 and 2 of paragraph (b) of subdivision 2 of
38 section 366 of the social services law, subparagraph 1 as amended by
39 chapter 638 of the laws of 1993, subparagraph 1 as designated and
40 subparagraph 2 as added by chapter 170 of the laws of 1994, clause (iii)
41 of subparagraph 2 as amended by chapter 187 of the laws of 2017, clause
42 (iv) of subdivision 2 as amended by chapter 656 of the laws of 1997 and
43 as further amended by section 104 of part A of chapter 62 of the laws of
44 2011, clause (vi) of subparagraph 2 as added by chapter 435 of the laws
45 of 2018, are amended to read as follows:

46 (1) In establishing standards for determining eligibility for and
47 amount of such assistance, the department shall take into account only
48 such income [~~and resources~~], in accordance with federal requirements, as
49 [~~are~~] is available to the applicant or recipient and as would not be
50 required to be disregarded or set aside for future needs, and there
51 shall be a reasonable evaluation of any such income [~~or resources~~]. The
52 department shall not consider the availability of an option for an
53 accelerated payment of death benefits or special surrender value pursu-
54 ant to paragraph one of subsection (a) of section one thousand one
55 hundred thirteen of the insurance law, or an option to enter into a
56 viatical settlement pursuant to the provisions of article seventy-eight

1 of the insurance law, as an available resource in determining eligibil-
2 ity for an amount of such assistance, provided, however, that the
3 payment of such benefits shall be considered in determining eligibility
4 for and amount of such assistance. There shall not be taken into consid-
5 eration the financial responsibility of any individual for any applicant
6 or recipient of assistance under this title unless such applicant or
7 recipient is such individual's spouse or such individual's child who is
8 under twenty-one years of age. In determining the eligibility of a child
9 who is categorically eligible as blind or disabled, as determined under
10 regulations prescribed by the social security act for medical assist-
11 ance, the income ~~[and resources]~~ of parents or spouses of parents are
12 not considered available to that child if she/he does not regularly
13 share the common household even if the child returns to the common
14 household for periodic visits. In the application of standards of eligi-
15 bility with respect to income, costs incurred for medical care, whether
16 in the form of insurance premiums or otherwise, shall be taken into
17 account. Any person who is eligible for, or reasonably appears to meet
18 the criteria of eligibility for, benefits under title XVIII of the
19 federal social security act shall be required to apply for and fully
20 utilize such benefits in accordance with this chapter.

21 (2) In evaluating the income ~~[and resources]~~ available to an applicant
22 for or recipient of medical assistance, for purposes of determining
23 eligibility for and the amount of such assistance, the department must
24 consider assets ~~[held in or]~~ paid from trusts created by such applicant
25 or recipient, as determined pursuant to the regulations of the depart-
26 ment, in accordance with the provisions of this subparagraph.

27 (i) In the case of a revocable trust created by an applicant or recip-
28 ient, as determined pursuant to regulations of the department: ~~[the~~
29 ~~trust corpus must be considered to be an available resource;]~~ payments
30 made from the trust to or for the benefit of such applicant or recipient
31 must be considered to be available income; and any other payments from
32 the trust must be considered to be assets disposed of by such applicant
33 or recipient for purposes of paragraph (d) of subdivision five of this
34 section.

35 (ii) In the case of an irrevocable trust created by an applicant or
36 recipient, as determined pursuant to regulations of the department: any
37 portion of the trust corpus, and of the income generated by the trust
38 corpus, from which no payment can under any circumstances be made to
39 such applicant or recipient must be considered, as of the date of estab-
40 lishment of the trust, or, if later, the date on which payment to the
41 applicant or recipient is foreclosed, to be assets disposed of by such
42 applicant or recipient for purposes of paragraph (d) of subdivision five
43 of this section; ~~[any portion of the trust corpus, and of the income~~
44 ~~generated by the trust corpus, from which payment could be made to or~~
45 ~~for the benefit of such applicant or recipient must be considered to be~~
46 ~~an available resource;]~~ payments made from the trust to or for the bene-
47 fit of such applicant or recipient must be considered to be available
48 income; and any other payments from the trust must be considered to be
49 assets disposed of by such applicant or recipient for purposes of para-
50 graph (d) of subdivision five of this section.

51 (iii) Notwithstanding the provisions of clauses (i) and (ii) of this
52 subparagraph, in the case of an applicant or recipient who is disabled,
53 as such term is defined in section 1614(a)(3) of the federal social
54 security act, the department must not consider as available income ~~[or~~
55 ~~resources]~~ the ~~[corpus or]~~ income of the following trusts which comply
56 with the provisions of the regulations authorized by clause (iv) of this

1 subparagraph: (A) a trust containing the assets of such a disabled indi-
2 vidual which was established for the benefit of the disabled individual
3 while such individual was under sixty-five years of age by the individ-
4 ual, a parent, grandparent, legal guardian, or court of competent juris-
5 diction, if upon the death of such individual the state will receive all
6 amounts remaining in the trust up to the total value of all medical
7 assistance paid on behalf of such individual; (B) and a trust containing
8 the assets of such a disabled individual established and managed by a
9 non-profit association which maintains separate accounts for the benefit
10 of disabled individuals, but, for purposes of investment and management
11 of trust funds, pools the accounts, provided that accounts in the trust
12 fund are established solely for the benefit of individuals who are disa-
13 bled as such term is defined in section 1614(a)(3) of the federal social
14 security act by such disabled individual, a parent, grandparent, legal
15 guardian, or court of competent jurisdiction, and to the extent that
16 amounts remaining in the individual's account are not retained by the
17 trust upon the death of the individual, the state will receive all such
18 remaining amounts up to the total value of all medical assistance paid
19 on behalf of such individual. Notwithstanding any law to the contrary,
20 a not-for-profit corporation may, in furtherance of and as an adjunct to
21 its corporate purposes, act as trustee of a trust for persons with disa-
22 bilities established pursuant to this subclause, provided that a trust
23 company, as defined in subdivision seven of section one hundred-c of the
24 banking law, acts as co-trustee.

25 (iv) The department shall promulgate such regulations as may be neces-
26 sary to carry out the provisions of this subparagraph. Such regulations
27 shall include provisions for: assuring the fulfillment of fiduciary
28 obligations of the trustee with respect to the remainder interest of the
29 department or state; monitoring pooled trusts; applying this subdivision
30 to legal instruments and other devices similar to trusts, in accordance
31 with applicable federal rules and regulations; and establishing proce-
32 dures under which the application of this subdivision will be waived
33 with respect to an applicant or recipient who demonstrates that such
34 application would work an undue hardship on him or her, in accordance
35 with standards specified by the secretary of the federal department of
36 health and human services. Such regulations may require: notification of
37 the department of the creation or funding of such a trust for the bene-
38 fit of an applicant for or recipient of medical assistance; notification
39 of the department of the death of a beneficiary of such a trust who is a
40 current or former recipient of medical assistance; in the case of a
41 trust, the corpus of which exceeds one hundred thousand dollars, notifi-
42 cation of the department of transactions tending to substantially
43 deplete the trust corpus; notification of the department of any trans-
44 actions involving transfers from the trust corpus for less than fair
45 market value; the bonding of the trustee when the assets of such a trust
46 equal or exceed one million dollars, unless a court of competent juris-
47 diction waives such requirement; and the bonding of the trustee when the
48 assets of such a trust are less than one million dollars, upon order of
49 a court of competent jurisdiction. The department, together with the
50 department of financial services, shall promulgate regulations governing
51 the establishment, management and monitoring of trusts established
52 pursuant to subclause (B) of clause (iii) of this subparagraph in which
53 a not-for-profit corporation and a trust company serve as co-trustees.

54 (v) Notwithstanding any acts, omissions or failures to act of a trus-
55 tee of a trust which the department or a local social services official
56 has determined complies with the provisions of clause (iii) and the

1 regulations authorized by clause (iv) of this subparagraph, the depart-
2 ment must not consider the [~~corpus or~~] income of any such trust as
3 available income [~~or resources~~] of the applicant or recipient who is
4 disabled, as such term is defined in section 1614(a)(3) of the federal
5 social security act. The department's remedy for redress of any acts,
6 omissions or failures to act by such a trustee which acts, omissions or
7 failures are considered by the department to be inconsistent with the
8 terms of the trust, contrary to applicable laws and regulations of the
9 department, or contrary to the fiduciary obligations of the trustee
10 shall be the commencement of an action or proceeding under subdivision
11 one of section sixty-three of the executive law to safeguard or enforce
12 the state's remainder interest in the trust, or such other action or
13 proceeding as may be lawful and appropriate as to assure compliance by
14 the trustee or to safeguard and enforce the state's remainder interest
15 in the trust.

16 (vi) The department shall provide written notice to an applicant for
17 or recipient of medical assistance who is or reasonably appears to be
18 eligible for medical assistance except for having income exceeding
19 applicable income levels. The notice shall inform the applicant or
20 recipient, in plain language, that in certain circumstances the medical
21 assistance program does not count the income of disabled applicants and
22 recipients if it is placed in a trust described in clause (iii) of this
23 subparagraph. The notice shall be included with the eligibility notice
24 provided to such applicants and recipients and shall reference where
25 additional information may be found on the department's website. This
26 clause shall not be construed to change any criterion for eligibility
27 for medical assistance.

28 § 7. Paragraph (a) of subdivision 3 of section 366 of the social
29 services law, as amended by chapter 110 of the laws of 1971, is amended
30 to read as follows:

31 (a) Medical assistance shall be furnished to applicants in cases
32 where, although such applicant has a responsible relative with suffi-
33 cient income [~~and resources~~] to provide medical assistance as determined
34 by the regulations of the department, the income [~~and resources~~] of the
35 responsible relative are not available to such applicant because of the
36 absence of such relative or the refusal or failure of such relative to
37 provide the necessary care and assistance. In such cases, however, the
38 furnishing of such assistance shall create an implied contract with such
39 relative, and the cost thereof may be recovered from such relative in
40 accordance with title six of article three of this chapter and other
41 applicable provisions of law.

42 § 8. Paragraph h of subdivision 6 of section 366 of the social
43 services law, as amended by section 69-b of part C of chapter 58 of the
44 laws of 2008, is amended to read as follows:

45 h. Notwithstanding any other provision of this chapter or any other
46 law to the contrary, for purposes of determining medical assistance
47 eligibility for persons specified in paragraph b of this subdivision,
48 the income [~~and resources~~] of responsible relatives shall not be deemed
49 available for as long as the person meets the criteria specified in this
50 subdivision.

51 § 9. Subparagraph (vii) of paragraph b of subdivision 7 of section 366
52 of the social services law, as amended by chapter 324 of the laws of
53 2004, is amended to read as follows:

54 (vii) be ineligible for medical assistance because the income [~~and~~
55 ~~resources~~] of responsible relatives are deemed available to him or her,

1 causing him or her to exceed the income [~~or resource~~] eligibility level
2 for such assistance;

3 § 10. Paragraph j of subdivision 7 of section 366 of the social
4 services law, as amended by chapter 324 of the laws of 2004, is amended
5 to read as follows:

6 j. Notwithstanding any other provision of this chapter other than
7 subdivision six of this section or any other law to the contrary, for
8 purposes of determining medical assistance eligibility for persons spec-
9 ified in paragraph b of this subdivision, the income [~~and resources~~] of
10 a responsible relative shall not be deemed available for as long as the
11 person meets the criteria specified in this subdivision.

12 § 11. Subdivision 8 of section 366 of the social services law, as
13 added by chapter 41 of the laws of 1992, is amended to read as follows:

14 8. Notwithstanding any inconsistent provision of this chapter or any
15 other law to the contrary, income [~~and resources~~] which [~~are~~] ~~is~~ other-
16 wise exempt from consideration in determining a person's eligibility for
17 medical care, services and supplies available under this title, shall be
18 considered available for the payment or part payment of the costs of
19 such medical care, services and supplies as required by federal law and
20 regulations.

21 § 12. Subparagraph (vi) of paragraph b of subdivision 9 of section 366
22 of the social services law, as added by chapter 170 of the laws of 1994,
23 is amended to read as follows:

24 (vi) be eligible or, if discharged, would be eligible for medical
25 assistance, or are ineligible for medical assistance because the income
26 [~~and resources~~] of responsible relatives are or, if discharged, would be
27 deemed available to such persons causing them to exceed the income [~~or~~
28 ~~resource~~] eligibility level for such assistance;

29 § 13. Paragraph k of subdivision 9 of section 366 of the social
30 services law, as added by chapter 170 of the laws of 1994, is amended to
31 read as follows:

32 k. Notwithstanding any provision of this chapter other than subdivi-
33 sion six or seven of this section, or any other law to the contrary, for
34 purposes of determining medical assistance eligibility for persons spec-
35 ified in paragraphs b and c of this subdivision, the income [~~and~~
36 ~~resources~~] of a responsible relative shall not be deemed available for
37 as long as the person meets the criteria specified in this subdivision.

38 § 14. Paragraph (d) of subdivision 12 of section 366 of the social
39 services law, as added by section 1 of part E of chapter 58 of the laws
40 of 2006, is amended to read as follows:

41 (d) Notwithstanding any provision of this chapter or any other law to
42 the contrary, for purposes of determining medical assistance eligibility
43 for persons specified in paragraph (b) of this subdivision, the income
44 [~~and resources~~] of a legally responsible relative shall not be deemed
45 available for as long as the person meets the criteria specified in this
46 subdivision; provided, however, that such income shall continue to be
47 deemed unavailable should responsibility for the care and placement of
48 the person be returned to his or her parent or other legally responsible
49 person.

50 § 15. Paragraph (b) of subdivision 16 of section 366 of the social
51 services law, as added by section 1 of part N of chapter 57 of the laws
52 of 2023, is amended to read as follows:

53 (b) Individuals eligible for participation in such waiver shall:

54 (i) be a disabled individual, defined as having a medically determina-
55 ble impairment of sufficient severity and duration to qualify for bene-
56 fits under Titles II or XVI of the social security act;

(ii) be at least sixteen years of age;
(iii) be otherwise eligible for medical assistance benefits, but for earnings [~~and/or resources~~] in excess of the allowable limit;
(iv) have net available income, determined in accordance with subdivision two of this section, that does not exceed two thousand two hundred fifty percent of the applicable federal poverty line, as defined and updated by the United States department of health and human services;

(v) [~~have resources, as defined in paragraph (e) of subdivision two of section three hundred sixty-six-c of this title, other than retirement accounts, that do not exceed three hundred thousand dollars;~~

~~(vi)]~~ contribute to the cost of medical assistance provided pursuant to this paragraph in accordance with paragraph (d) of this subdivision; and

~~(vii)]~~ (vi) meet such other criteria as may be established by the commissioner as may be necessary to administer the provisions of this subdivision in an equitable manner.

§ 16. Paragraph (b) of subdivision 2 of section 366-a of the social services law is REPEALED and paragraphs (c) and (d) of subdivision 2, paragraph (d) as added by section 29 of part B of chapter 58 of the laws of 2010, are relettered paragraphs (b) and (c) and paragraph (c) is amended to read as follows:

(c) Notwithstanding the provisions of paragraph (a) of this subdivision, an applicant or recipient [~~whose eligibility under this title is determined without regard to the amount of his or her accumulated resources~~] may attest to the amount of interest income generated by such resources if the amount of such interest income is expected to be immaterial to medical assistance eligibility, as determined by the commissioner of health. In the event there is an inconsistency between the information reported by the applicant or recipient and any information obtained by the commissioner of health from other sources and such inconsistency is material to medical assistance eligibility, the commissioner of health shall request that the applicant or recipient provide adequate documentation to verify his or her interest income.

§ 17. Paragraph (a) of subdivision 8 of section 366-a of the social services law, as amended by section 7 of part B of chapter 58 of the laws of 2010, is amended to read as follows:

(a) Notwithstanding subdivisions two and five of this section, information concerning income [~~and resources~~] of applicants for and recipients of medical assistance may be verified by matching client information with information contained in the wage reporting system established by section one hundred seventy-one-a of the tax law and in similar systems operating in other geographically contiguous states, by means of an income verification performed pursuant to a memorandum of understanding with the department of taxation and finance pursuant to subdivision four of section one hundred seventy-one-b of the tax law, and, to the extent required by federal law, with information contained in the non-wage income file maintained by the United States internal revenue service, in the beneficiary data exchange maintained by the United States department of health and human services, and in the unemployment insurance benefits file. Such matching shall provide for procedures which document significant inconsistent results of matching activities. Nothing in this section shall be construed to prohibit activities the department reasonably believes necessary to conform with federal requirements under section one thousand one hundred thirty-seven of the social security act.

§ 18. Subdivision 1 of section 366-c of the social services law, as added by chapter 558 of the laws of 1989, is amended to read as follows:

1. Notwithstanding any other provision of law to the contrary, in determining the eligibility for medical assistance of a person defined as an institutionalized spouse, the income ~~[and resources]~~ of such person and the person's community spouse shall be treated as provided in this section.

§ 19. Paragraphs (c), (d) and (e) of subdivision 2 of section 366-c of the social services law are REPEALED and paragraphs (f), (g), (h), (i), (j) and (k) of subdivision 2 are relettered paragraphs (c), (d), (e), (f), (g) and (h).

§ 20. Subdivisions 5 and 6 of section 366-c of the social services law are REPEALED and subdivisions 7 and 8, as added by chapter 558 of the laws of 1989, are renumbered subdivisions 5 and 6 and amended to read as follows:

5. (a) At the beginning or after the commencement of a continuous period of institutionalization, either spouse may request ~~[an assessment of the total value of their resources or]~~ a determination of the community spouse monthly income allowance, the amount of the family allowance, or the method of computing the amount of the family allowance, or the method of computing the amount of the community spouse income allowance.

(b) ~~[(i) Upon receipt of a request pursuant to paragraph (a) of this subdivision together with all relevant documentation of the resources of both spouses, the social services district shall assess and document the total value of the spouses' resources and provide each spouse with a copy of the assessment and the documentation upon which it was based. If the request is not part of an application for medical assistance benefits, the social services district may charge a fee for the assessment which is related to the cost of preparing and copying the assessment and documentation which fee may not exceed twenty five dollars.]~~

~~(ii)]~~ The social services district shall ~~[also]~~ notify each requesting spouse of the community spouse monthly income allowance, of the amount, if any, of the family allowances, and of the method of computing the amount of the community spouse monthly income allowance.

(c) The social services district shall also provide to the spouse a notice of the right to a fair hearing at the time of provision of the information requested under paragraph (a) of this subdivision or after a determination of eligibility for medical assistance. Such notice shall be in the form prescribed or approved by the commissioner and include a statement advising the spouse of the right to a fair hearing under this section.

6. (a) If, after a determination on an application for medical assistance has been made, either spouse is dissatisfied with the determination of the community spouse monthly allowance~~[r]~~ ~~or the amount of monthly income otherwise available to the community spouse[, the computation of the spousal share of resources, the attribution of resources or the determination of the community spouse's resource allocation]~~, the spouse may request a fair hearing to dispute such determination. Such hearing shall be held within thirty days of the request therefor.

(b) If either spouse establishes that the community spouse needs income above the level established by the social services district as the minimum monthly maintenance needs allowance, based upon exceptional circumstances which result in significant financial distress (as defined by the commissioner in regulations), the department shall substitute an

1 amount adequate to provide additional necessary income from the income
2 otherwise available to the institutionalized spouse.

3 ~~[(c) If either spouse establishes that income generated by the commu-~~
4 ~~nity spouse resource allowance, established by the social services~~
5 ~~district, is inadequate to raise the community spouse's income to the~~
6 ~~minimum monthly maintenance needs allowance, the department shall estab-~~
7 ~~lish a resource allowance for the spousal share of the institutionalized~~
8 ~~spouse adequate to provide such minimum monthly maintenance needs allow-~~
9 ~~ance.]~~

10 § 21. The commissioner of health shall, expeditiously and as neces-
11 sary, submit any state plan amendment or waiver requests necessary to
12 maintain federal financial participation under this act.

13 § 22. This act shall take effect immediately; provided however, that
14 sections one and two of this act shall take effect January 1, 2025;
15 provided, further, however, that sections three, four, five, six, seven,
16 eight, nine, ten, eleven, twelve, thirteen, fourteen, fifteen, sixteen,
17 seventeen, eighteen, nineteen and twenty of this act shall take effect
18 January 1, 2026; provided, further, however, that if section 3 of part
19 AAA of chapter 56 of the laws of 2022 shall not have taken effect on or
20 before such dates then sections one-a and four-a of this act shall take
21 effect on the same date and in the same manner as such section of such
22 part of such chapter of the laws of 2022, takes effect; provided,
23 further, however, that the amendments to subdivision 6 of section 366 of
24 the social services law made by section eight of this act shall not
25 affect the repeal of such subdivision and shall be deemed repealed ther-
26ewith; provided, further, however, that if section 1 of part N of chap-
27ter 57 of the laws of 2023 shall not have taken effect on or before such
28date then section fifteen of this act shall take effect on the same date
29and in the same manner as such section of such part of such chapter of
30the laws of 2023, takes effect; provided, further, however, that the
31effectiveness of sections one through twenty of this act shall be
32subject to federal financial participation; provided, further, however,
33that the commissioner of health shall notify the legislative bill draft-
34ing commission upon the occurrence of federal financial participation in
35order that the commission may maintain an accurate and timely effective
36data base of the official text of the laws of the state of New York in
37furtherance of effectuating the provisions of section 44 of the legisla-
38tive law and section 70-b of the public officers law. Effective imme-
39diately, the addition, amendment and/or repeal of any rule or regulation
40necessary for the implementation of this act on its effective date are
41authorized to be made and completed on or before such effective date.