

**Availability and Treatment of Lump-Sum Income**

- (1) *Lump-sum income* (see OAR [461-001-0000](#)) is treated as follows if it is received by a member of a *financial group* (see OAR [461-110-0530](#)).
- (2) In the EA, REF, REFM, SNAP, and TANF programs:
  - (a) *Lump-sum income* is a resource.
  - (b) In the EA, REF, REFM, and TANF programs:
    - (A) *Lump-sum income* is considered available to the *financial group* when a member of the group receives the income and until the income becomes unavailable for a reason beyond the group's control.
    - (B) *Lump-sum income* is considered unavailable for a reason beyond the group's control if the member who received the *lump-sum income*:
      - (i) Leaves the *financial group* before spending any of the *lump-sum income*; or
      - (ii) Spends the *lump-sum income* on an immediate basic need or emergency.
- (3) In the OSIP, OSIPM, and QMB-DW programs, *lump-sum income* is treated as follows:
  - (a) *Lump-sum income* not excluded is income in the month of receipt, and any amount remaining in future months is a resource, except that in the OSIP and OSIPM programs retroactive Social Security Benefits (SSB) and Supplemental Security Income (SSI) payments are treated in accordance with OAR [461-145-0490](#) and [461-145-0510](#).
  - (b) The following *lump-sum income* is excluded when calculating *countable* (see OAR [461-001-0000](#)) income for the purposes of

determining eligibility and calculating patient liability under OAR [461-160-0620](#):

- (A) The income the individual turns over to the Department as reimbursement for previous assistance; and
  - (B) The income the individual uses to pay for special need items approved by the Department. Special needs are explained in OAR [461-155-0500](#) and following.
- (c) When calculating *countable* income for the purposes of eligibility, the following exclusions apply to the total amount of combined *lump-sum income* and *periodic income* (see OAR [461-001-0000](#)) received by an individual each month, including non-applying spouses and children:
- (A) The first \$10 of earned income received in a month.
  - (B) The first \$20 of unearned income received in a month.
- (4) In the QMB-BAS, QMB-SMB, and QMB-SMF programs:
- (a) *Lump-sum income* not excluded is income in the month of receipt, except that retroactive SSB and SSI payments are treated in accordance with OAR [461-145-0490](#) and [461-145-0510](#).
  - (b) The following *lump-sum income* is excluded:
    - (A) The income the individual turns over to the Department as reimbursement for previous assistance; and
    - (B) The income the individual uses to pay for special need items approved by the Department. Special needs are explained in OAR [461-155-0500](#) and following.
  - (c) The following exclusions apply to combined *lump-sum income* and *periodic income* received by an individual, including non-applying spouses and children:

- (A) The first \$10 of earned income received in a month.
- (B) The first \$20 of unearned income received in a month.

Statutory/Other Authority: ORS [409.050](#), [410.070](#), [411.060](#), [411.070](#), [411.404](#), [411.816](#), [412.014](#), [412.049](#), [413.085](#), [414.619](#)

Statutes/Other Implemented: ORS [409.010](#), [410.010](#), [410.020](#), [410.070](#), [410.080](#), [411.060](#), [411.070](#), [411.404](#), [411.706](#), [411.816](#), [412.014](#), [412.049](#), [413.085](#), [414.117](#), [414.619](#)

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