HOUSE DOCKET, NO. 789 FILED ON: 1/28/2021

HOUSE . . . . . No. 1242

The Commonwealth of Massachusetts

PRESENTED BY:

Christine P. Barber

To the Honorable Senate and House of Representatives of the Commonwealth of Massachusetts in General Court assembled:

The undersigned legislators and/or citizens respectfully petition for the adoption of the accompanying bill:

An Act relative to transfers of assets by MassHealth members.

PETITION OF:

NAME:	DISTRICT/ADDRESS:	DATE ADDED:
Christine P. Barber	*34th Middlesex*	*1/28/2021*
Brian W. Murray	*10th Worcester*	*3/16/2021*
Natalie M. Higgins	*4th Worcester*	*9/8/2021*

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By Ms. Barber of Somerville, a petition (accompanied by bill, House, No. 1242) of Christine P. Barber and Brian W. Murray relative to transfers of assets by MassHealth members. Health Care Financing.

[SIMILAR MATTER FILED IN PREVIOUS SESSION
SEE HOUSE, NO. *1128* OF 2019-2020.]

The Commonwealth of Massachusetts

In the One Hundred and Ninety-Second General Court
(2021-2022)

An Act relative to transfers of assets by MassHealth members.

Be it enacted by the Senate and House of Representatives in General Court assembled, and by the authority of the same, as follows:

SECTION 1: Section 28 of chapter 118E of the General Laws is hereby amended by inserting at the end thereof, the following section:

The division shall not impose a period of ineligibility against an individual who demonstrates that a transfer of assets by said individual or his spouse was intended exclusively for a purpose other than qualifying for MassHealth or was intended to be a transfer for fair market value. The division shall consider specific factors in determining whether the individual has met his burden in establishing such intent including but not limited to the following:

1) The individual provides documentation demonstrating a regular pattern of small transfers for at least three years consistent with the transfer in question;

2) The individual or his spouse made the transfer to a religious institution, charity or other non-profit entity in an amount consistent with prior charitable giving ;

3) at the time of the transfer the individual and his spouse had resources at or below the allowable limit for MassHealth eligibility for long term care;

4) the transfer was intended to alleviate a relative's financial crisis, prevent a relative's mortgage foreclosure or pay for a relative's medical care; or

5) at the time of the resource transfer, the individual's medical record did not indicate a significant likelihood that the individual would require nursing home services in the near future.

If the individual establishes any of the above factors, then the burden of proving that the individual intended the transfer of assets to qualify the individual for MassHealth shifts to the division.

The division shall promulgate regulations implementing this section.