



Office of Temporary and Disability Assistance

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Informational Letter

Section 1

Transmittal:	17-INF-09
To:	Social Services District Commissioners
Issuing Division/Office:	Integrated Family Assistance Programs / Employment and Income Support Programs
Date:	June 2, 2017
Subject:	Introduction of LDSS-5091 "Lump Sum Worksheet" Form
Suggested Distribution:	Temporary Assistance Directors Supplemental Nutrition Assistance Program Directors Staff Development Coordinators
Contact Person(s):	Temporary Assistance Bureau at: (518) 474-9344
Attachments:	LDSS-5091 Lump Sum Form
Attachment Available Online:	<input checked="" type="checkbox"/>

Filing References

Previous ADMs/INFs	Releases Cancelled	Dept. Regs.	Soc. Serv. Law & Other Legal Ref.	Manual Ref.	Misc. Ref.
16 ADM-09 14 ADM-04 04 INF-12 03 ADM-10	04 INF-17	352.23(b) 352.29(h)	SSL 131-a 131-n	TASB Chapter 18, Section T	

Section 2

I. Purpose

The purpose of this informational letter is to advise local districts of the development of a form designed to assist local district staff in implementing the lump sum set-aside policy first introduced in [03 ADM-10](#) and later revised in both [14 ADM-04](#) and [16 ADM-09](#).

II. Background

Changes to lump sum policy provisions were introduced in [03 ADM-10](#) and required that local districts allow a resource set-aside and additional "big-ticket" set-asides from a

lump sum received by a Temporary Assistance (TA) recipient. More recently, changes were made to the vehicle resource exemption limits and the accounts that recipients are able to establish to pay for college tuition. In order to ensure that districts are continuing to properly apply lump sum policy, it is important for districts to process TA cases that receive a lump sum in a methodical, step-by-step fashion.

The [LDSS-5091](#) form was designed to replace the lump sum set-aside worksheet published with [04 INF-17](#). The new form has been developed using the updated vehicle resource exemption policy and the expanded resource exemption that allows recipients to set up savings accounts designated for tuition at a four-year post-secondary institution. This form is recommended for use by districts to assist them in implementing the most updated lump sum policy.

III. Program Implications

Use of the lump sum form attached to this informational letter is optional. However, districts may find it to be a useful tool in applying TA lump sum policy. The new form is posted on the intranet page for LDSS e-forms. For a review of the policy associated with the use of this form, see [03 ADM-10](#), [14 ADM-04](#) and [16 ADM-09](#).

IV. Forms Ordering Information

- The English version of the LDSS-5091: “*Lump Sum Worksheet*” is a Web Posted Only form.
- The above referenced document has been posted on the OTDA Intranet website at: http://otda.state.ny.net/ldss_eforms/default.htm and is available for downloading by local districts for reproduction locally.
- This document is a Web posted only form, therefore, it is only available on-line and is not available in hard copy from the New York State Office of Temporary and Disability Assistance (OTDA).
- Questions concerning Web posted only forms should be directed to BMS Document Services at: (518) 474-9522.
- Any requests for a Local Equivalent of this form should be submitted to the mailing address below for review and approval.

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Issued By

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