

2506 – MEDICAID INDIVIDUAL BUDGETING

POLICY STATEMENT	Individual budgeting is completed when an individual residing in LA-A or B applies for or receives ABD Medicaid as a Medicaid Individual with no spouse.
BASIC CONSIDERATIONS	<p>An individual budget is completed for a Medicaid Individual residing in LA-A or B without a spouse whose eligibility is determined under the following classes of assistance (COAs):</p> <ul style="list-style-type: none"> • SSI (3 months prior or intervening months) • Public Law Classes, including Disabled Widow(er) and Disabled Adult Child (DAC) • ABD Medically Needy (AMN) • QMB • SLMB • QI-1 • QDWI
PROCEDURES	<p>Enter the appropriate information in the computer system to allow the system to budget correctly.</p> <p style="text-align: center;">OR</p> <p>Follow the procedures below to manually complete an Individual budget on Form 172:</p> <p>Step 1 Complete Section A of Form 172.</p> <ul style="list-style-type: none"> • Include the income of the Medicaid individual in Section A. • Use the Individual income limit for the COA under which the Medicaid individual is applying. <p>Step 2 If there is a deficit on Line 13 of Section A, the Medicaid individual is eligible under this COA based on income.</p> <p>Step 3 If there is a surplus or zero on Line 13 of Section A, the Medicaid individual is ineligible under this COA. Complete a CMD. Refer to Section 2052, Continuing Medicaid Determination.</p> <p>EXCEPTION: If the individual is applying for QMB and there is a zero on Line 13, the individual is eligible for QMB based on income.</p> <p>EXCEPTION: If the individual is being budgeted under AMN and there is a surplus on Line 13, use the amount from Line 13 as the AMN spenddown.</p>