

2509 – COUPLE BUDGETING

POLICY STATEMENT	Couple budgeting is completed when an individual and his/her spouse residing in LA-A or B both apply for or receive ABD Medicaid as a Medicaid couple.
BASIC CONSIDERATIONS	<p>A couple budget is completed for a Medicaid couple residing in LA-A or B whose ABD Medicaid 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>Refer to Section 2503, Couples, for additional information on when to complete a couple budget.</p> <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 complete a manual couple budget on Form 172.</p> <p>Step 1 Complete Section C of Form 172.</p> <ul style="list-style-type: none"> • Include the income of both spouses of the Medicaid couple in Section C. • Allow only one \$20 general deduction and one \$65 earned income deduction when completing Section C. <p>Step 2 If there is a deficit on Line 13 of Section C, the Medicaid couple is eligible under this COA based on income.</p>

PROCEDURES
(cont.)**Step 3**

If there is a surplus or zero on Line 13 of Section C, the Medicaid couple is ineligible under this COA. Complete a CMD. Refer to Section 2052, Continuing Medicaid Determination.

EXCEPTION: If the couple is applying for QMB and there is a zero on Line 13, the individual is eligible for QMB based on income.

EXCEPTION: If the couple is being budgeted under AMN and there is a surplus on Line 13, use the amount from Line 13 as the AMN spenddown.

NOTE: If the couple is ineligible for all COAs using Couple budgeting, complete a Spouse to Spouse Deeming budget on each spouse to determine whether one or the other spouse is eligible based on income as a Medicaid individual with an ineligible spouse.