

## 2610 - MAGI BUDGET GROUPS/ASSISTANCE UNITS

**POLICY  
STATEMENT**

The Family Medicaid Assistance Unit (AU) includes individuals for whom health coverage is requested and for whom Medicaid coverage is available.

The Family Medicaid Budget Group (BG) consists of tax filers and their dependents, or non tax filers and their spouses, children under the age of 19 (natural, adopted or step), and for children under the age of 19, natural, adopted and step parents, and natural, adopted and step siblings under the age of 19. The BG also includes any unborn child of an individual included in the BG whom is pregnant.

**BASIC  
CONSIDERATIONS**

Certain individuals living in the home are included in the eligibility determination for the AU members. These individuals as well as all the AU members comprise the Budget Group (BG).

In all Medicaid Classes of Assistance (COAs), only the AU members receive Medicaid upon approval of the application.

**Budget Group  
Composition  
(Tax Filers)**

The BG for tax filers consists of the following individuals:

- the tax filer
- all persons whom the tax filer expects to claim as a tax dependent, who does not expect to be claimed as a tax dependent by another tax filer.
- his/her spouse even if not filing jointly
- any unborn child of an individual included in the BG whom is pregnant.

**Budget Group  
Composition  
(Non Tax Filers)**

The budget group for non tax filers consists of the following individuals:

- the individual
- the individual's spouse
- the individual's biological/natural, adopted and step child(ren) under the age of 19
- for any child under the age of 19, include that child's biological/natural, adopted and step parents and biological/natural, adopted and step sibling(s) under the age of 19.
- any unborn child of an individual included in the BG whom is pregnant.

The BG size determines the net taxable income limit(s) for a Family Medicaid COA. The taxable incomes of all individuals, that would be required to file a tax return regardless if they actually file a tax return or not, in the BG are used to determine eligibility.

If a pregnant woman requests or receives Medicaid, the unborn child is included in the BG for the case, regardless of COA.

**BASIC  
CONSIDERATIONS****Budget Group  
Composition  
(cont.)**

The BG size is increased accordingly, in Presumptive Eligibility (PE) Pregnancy Medicaid and Pregnant Woman Medicaid per her statement only, no medical verification is requested.

The BG size, for all other Modified Adjusted Gross Income (MAGI) Medicaid Class of Assistance (COA), is increased accordingly if it is medically verified that the pregnant woman is carrying more than one fetus. If the AU is eligible without including the multiple fetuses, do not request verification. The case should be approved without delaying for returned verification. If verification of multiple fetuses is needed but not returned, the case should be processed with only one fetus in the BG.

**PROCEDURES**

Follow the steps below to determine the composition of the Medicaid AU and BG for each individual:

**Step 1** Determine if the individual is a tax filer

**Step 2** If individual is a tax filer, include the following people in the BG:

- the tax filer
- all persons whom the tax filer expects to claim as a tax dependent, who does not expect to be claimed as a tax dependent by another tax filer.
- his/her spouse even if not filing jointly
- any unborn child of an individual included in the BG whom is pregnant

**Step 3** If individual is not a tax filer, the BG must include the following:

- the individual
- the individual's spouse
- the individual's natural, adopted and step child(ren) under the age of 19
- for any child under the age of 19, include that child's natural, adopted and step parents and natural, adopted and step sibling(s) under the age of 19.
- any unborn child of an individual included in the BG whom is pregnant

**Step 4** Exclude the following individuals from the Medicaid AU, but **include** them in the Medicaid BG:

- an adult who fails to cooperate with the Division of Child Support Services (DCSS) or Third Party Liability (TPL) requirements

**NOTE:** A child is **never** excluded from the AU because of

**PROCEDURES**

(cont.)

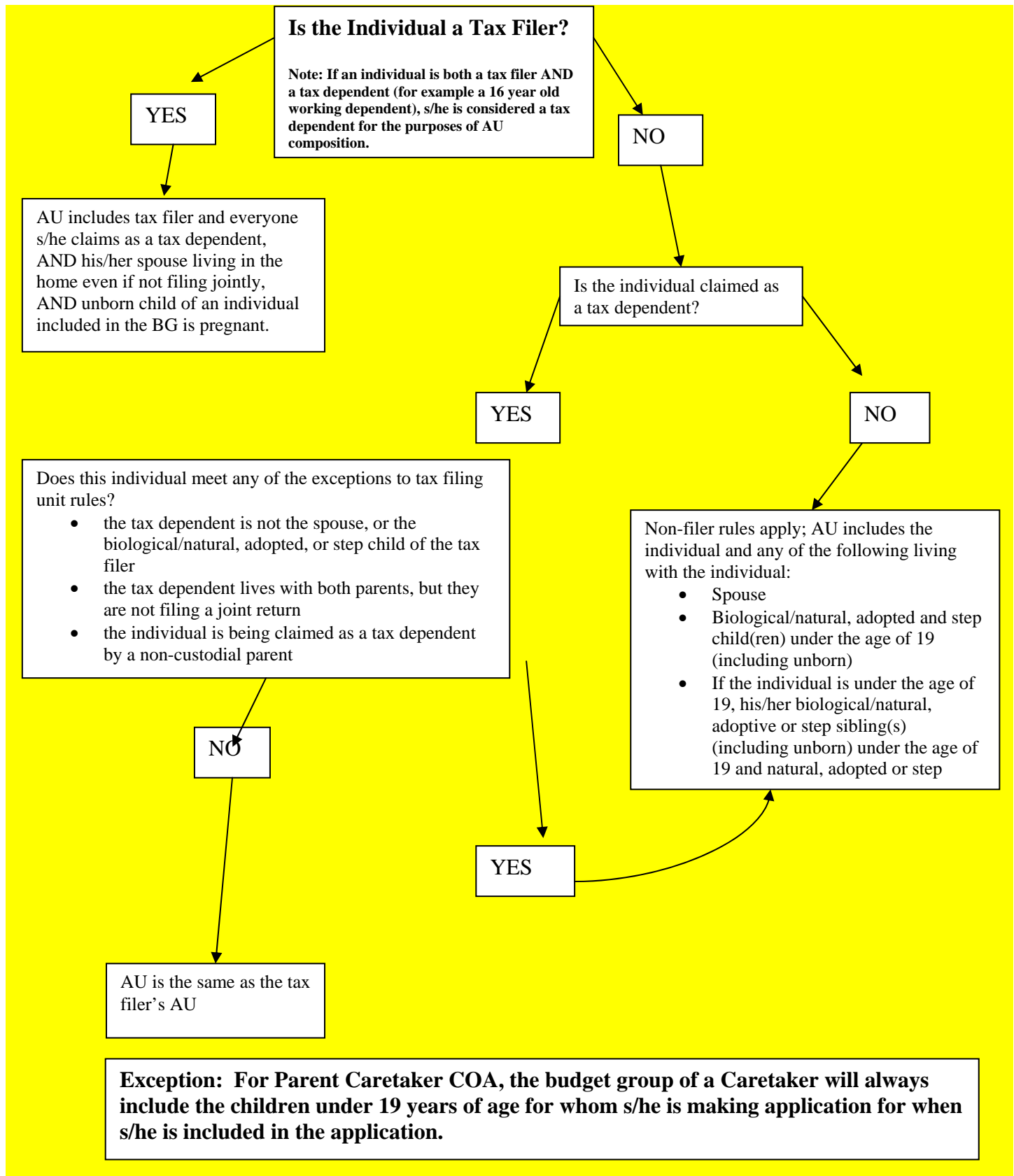
an adult's failure to cooperate with DCSS or TPL.

- an individual who does not meet the citizenship or eligible qualified immigrant status requirements

**EXCEPTION:** EMA

- an adult who fails to cooperate with the enumeration requirement for him/herself.

**EXCEPTION:** An individual who is not a citizen or a qualified immigrant is **not** required to meet the enumeration requirement

**Chart 2610.1- Determining the AU for Each Applicant or Beneficiary**

Use the following chart to determine composition of the AU and BG:

**NOTE:** The term **child** used in this chart includes 19 year olds. The term **parent** used in this chart includes biological, natural, adopted or step.

<b>CHART 2610.2 - DETERMINING THE COMPOSITION OF A MAGI AU AND/OR BG</b>	
<b>SITUATION</b>	<b>TREATMENT</b>
Adult is absent from the home because of treatment or training.	<p><b>Include</b> the adult in the AU and/or BG when all of the following conditions exist:</p> <ul style="list-style-type: none"> <li>the absence is temporary, with a plan for treatment or training to return the adults to the home</li> </ul> <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> <li>the adult continues to exercise care and control of the AU child(ren)</li> </ul> <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> <li>the adult wants to be included in the AU and BG during the absence and is eligible to be included.</li> </ul> <p><b>NOTE:</b> Treatment or training may be received at locations such as schools, general hospitals, private psychiatric hospitals, nursing homes, and Job Corps facilities. This list is not all-inclusive.</p> <p><b>Exclude</b> the adult from the AU and/or BG if any of the following conditions exists:</p> <ul style="list-style-type: none"> <li>The adult is incarcerated.</li> <li>The adult is in a public institution.</li> <li>The adult is legally committed to an institution.</li> </ul> <p>Refer to <a href="#">Section 2066</a>, Placement Outside the Home.</p>
Adult (parent, spouse, or Caretaker) is absent from the home because of duty in the uniformed forces of the United States.	Use tax filer or non tax filer status and include in the BG and AU.

<b>CHART 2610.2 (CONT.) - DETERMINING THE COMPOSITION OF A MAGI AU AND/OR BG</b>	
<b>SITUATION</b>	<b>TREATMENT</b>
Child is absent from the home because of treatment or training.	<p>Include the child in the AU when all of the following conditions exist:</p> <ul style="list-style-type: none"> <li>the absence is temporary, with a plan for treatment or training to return the child to the home</li> </ul> <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> <li>the care and control of the dependent child continues to be the responsibility of the caretaker relative</li> </ul> <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> <li>the caretaker or other eligible adult wants the child to be included in the AU.</li> </ul> <p><b>NOTE:</b> Treatment or training may be received at locations such as schools, general hospitals, private psychiatric hospitals, nursing homes, and Job Corps facilities. This list is not all-inclusive.</p> <p><b>NOTE:</b> Refer to <a href="#">Section 2066</a>, in Placement Outside the Home.</p>
Child is placed in a residential dependent care institution, such as GA Baptist Children's Home, United Methodist Children's Home or GA Sheriffs Boys' ranch.	<p>Consider the child an AU of one and determine the child's Medicaid eligibility if the following conditions are met:</p> <ul style="list-style-type: none"> <li>the center is privately owned and operated</li> </ul> <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> <li>the center is a public facility and the placement is temporary pending other arrangements appropriate to the child's needs.</li> </ul> <p><b>NOTE:</b> Refer to <a href="#">Section 2066</a>, Placement Outside the Home.</p>
Child lives alone.	Consider the child to be an AU of one and determine his/her eligibility for Children Under 19 Years of Age or MN.
Child lives with a Caretaker; everyone applies for health coverage.	Determine if the child and the Caretaker are eligible for Parent/Caretaker with Child(ren) Medicaid. Exclude the Caretaker from the AU and BG if not eligible for Parent/Caretaker with Child(ren) Medicaid. Consider the child to be an AU of one and determine their eligibility for Children Under 19 Years of Age

**VERIFICATION**

Accept the A/R's statement to determine the AU and BG composition unless the information provided conflicts with other information available to the agency or is otherwise questionable. A conflicting or questionable situation must be verified and documented.

**DOCUMENTATION**

Document the following for every individual in the home:

- name and his/her relationship to the AU members
- tax filer or non tax filer status