

2610 - MAGI BUDGET GROUPS/ASSISTANCE UNITS

**POLICY
STATEMENT**

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

The Family Medicaid MAGI Budget Group (BG) consists of tax filers and their tax dependents, or non tax filers and in their home their spouses, children under the age of 19 (natural, biological adopted or step), and for children under the age of 19, natural, biological, adopted and step parents, and natural, biological, 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. The Family Medicaid Non MAGI Budget group (BG) consists of specified relative relations. Refer to Section 2620 Non Magi Groups/Assistance Units.

**BASIC
CONSIDERATIONS**

Certain individuals living/not living in the home are included in the eligibility determination for the MAGI AU members. These individuals as well as all the MAGI AU members comprise the MAGI 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 that live in the home:

- 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 MAGI 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.

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

Exception: MAGI Medicaid does not include taxable income of a child in the BG when the total taxable amount is below the allowable IRS dependent exemption amount regardless if the child is required to file a tax return and/or if they do file a tax return. The dependent exemption amount is established by IRS yearly and is set each January for the previous tax year. The dependent exemption will be used for the current MAGI Medicaid year.

The threshold for not being required to file a tax return is \$6100 for earned income and \$1000 for unearned income for tax year 2013.

For tax year 2014, the threshold is \$6200 for earned income and \$1000 for unearned income.

NOTE: RSDI income for the tax dependent/child does not count toward the unearned income threshold. Refer to Section 2499.

Filing a tax return and filing for a tax refund are not the same.

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

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.

NOTE: Do not refer to the Department of Public Health (DPH) for medical verification. DPH is not medically equipped to medically verify the expected births.

NOTE: Active MAGI Medicaid cases will be updated with the report of pregnancy. Do not change the MAGI COA to Pregnant Women Medicaid unless they are penalized and not actively receiving Medicaid in the AU.

PROCEDURES

Follow the steps below to determine the composition of the MAGI Family 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:

PROCEDURES
(cont.)

Step 3

- 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

If individual is not a tax filer, the BG must include the following that live in the home:

- the individual
- the individual's spouse
- the individual's natural, biological, adopted and step child(ren) under the age of 19
- for any child under the age of 19, include that child's natural, biological, 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

NOTE: SSI recipients must be included in the budget group for MAGI COAs, but the income of the SSI recipient is not counted in the budget. For Non MAGI Medicaid SSI recipients and SSI are not counted in the BG.

Step 4

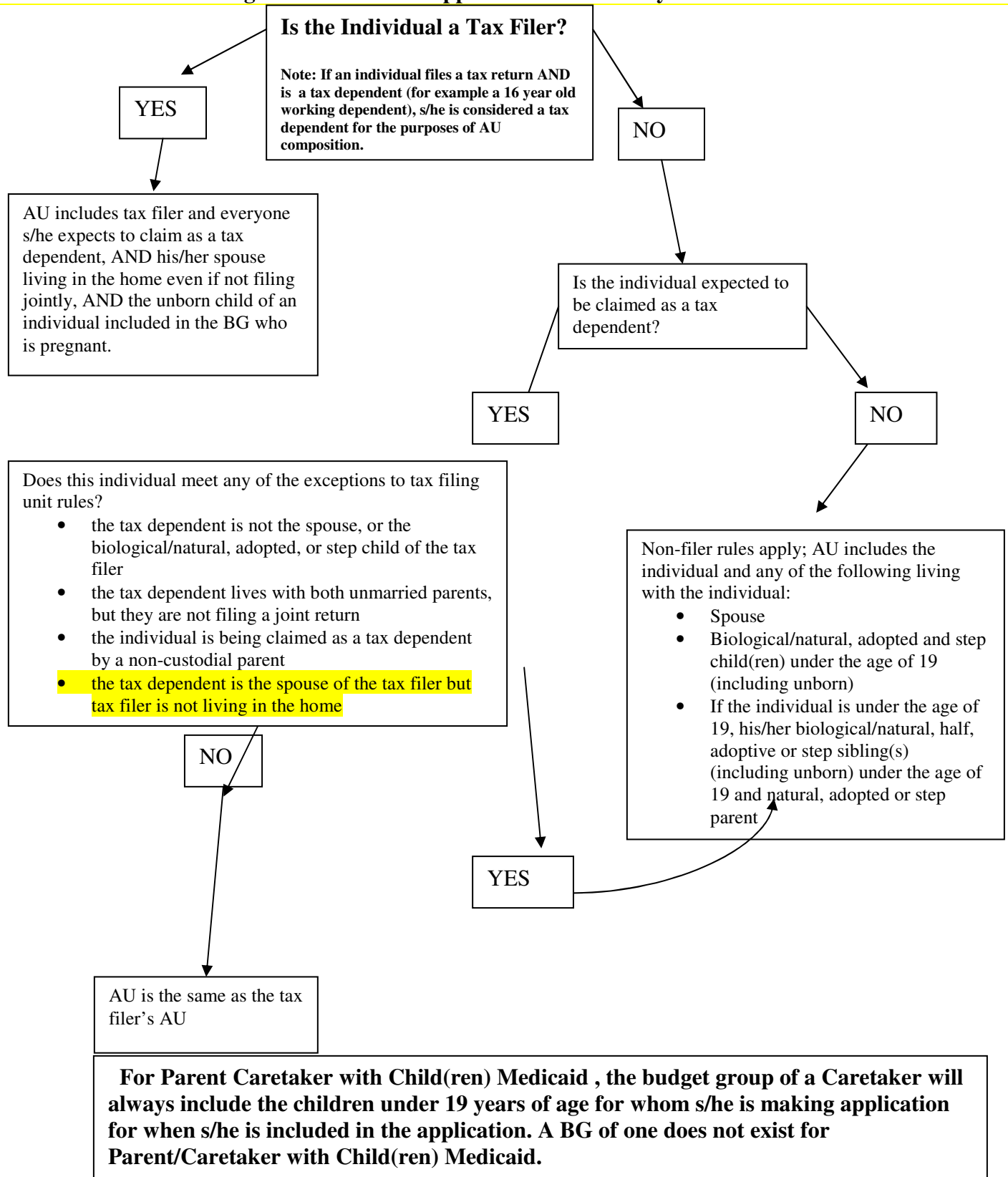
Exclude the following individuals from the Medicaid AU, but **include** them in the MAGI and Non MAGI Medicaid BG:

- 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 an adult's failure to cooperate with DCSS or TPL.
- an individual who does not meet the citizenship or eligible qualified immigrant status requirements (including those with an expired Reasonable Opportunity Period)

EXCEPTION: An individual who is not a citizen or a qualified immigrant is **not** required to meet the citizen/immigration status requirement and is potentially eligible for Emergency Medical Assistance (EMA). Refer to Section [2054](#) **Emergency Medical Assistance.**

- 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 and is potentially eligible for Emergency Medical Assistance (EMA). Refer to Section 2054, Emergency Medical Assistance.

Chart 2610.1- Determining the AU for Each Applicant or Beneficiary

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

NOTE: The term **child** used in this chart includes only those under the age of 19. The terms **parent(s), child(ren) and sibling(s)** used in this chart includes biological, natural, adopted or step. The term caretaker used in this chart is not limited to a specified relative relationship. Caretakers are adults that care for a child in their home and are not a parent of that child regardless if they expect/not expect to claim the child on their tax return.

CHART 2610.2 - DETERMINING THE COMPOSITION OF A MAGI AU AND/OR BG	
SITUATION	TREATMENT
Adult (Parent, spouse or caretaker) is absent from the home because of treatment or training.	<p>Include the adult in the AU and/or BG when all of the following conditions exist:</p> <ul style="list-style-type: none"> the absence is temporary, with a plan for treatment or training to return the adults to the home <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> the adult continues to exercise care and control of the AU child(ren) <p>NOTE: 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>Exclude the adult from the AU and/or BG if any of the following conditions exists:</p> <ul style="list-style-type: none"> The adult is incarcerated. The adult is in a public institution. The adult is legally committed to an institution. <p>For MAGI Medicaid if the tax filer expects to claim any of these adults on their return, the adult continues to be counted in the BG but is not allowed in the AU. For Non MAGI Medicaid these adults will not be included in the BG nor the AU until they return to the home.</p> <p>Refer to Section 2066, 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.

CHART 2610.2 (CONT.) - DETERMINING THE COMPOSITION OF A MAGI AU AND/OR BG	
SITUATION	TREATMENT
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"> the absence is temporary, with a plan for treatment or training to return the child to the home <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> the care and control of the dependent child continues to be the responsibility of the parent or caretaker <p>NOTE: 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>NOTE: Refer to Section 2066, 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"> the center is privately owned and operated <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> the center is a public facility and the placement is temporary pending other arrangements appropriate to the child's needs. <p>NOTE: Refer to Section 2066, Placement Outside the Home.</p>
Child lives alone.	<p>Consider the child to be an AU of one and determine his/her eligibility for Children Under 19 Years of Age or MN. Continued Medicaid Determination (CMD) to PeachCare for Kids® or Federally Facilitated Marketplace (FFM) when applicable.</p>
Child lives with a Caretaker; everyone applies for health coverage.	<p>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 or MN. Continued Medicaid Determination (CMD) to PeachCare for Kids® or Federally Facilitated Marketplace (FFM) when applicable.</p>

VERIFICATION

Accept the A/R's statement to determine the MAGI 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 MAGI AU members
- tax filer or non tax filer status