

## 2210 - APPLICATION FOR OTHER BENEFITS

POLICY STATEMENT	An Applicant/Recipient (A/R) for Medicaid must apply for and accept all other monetary benefits, payments or allotments to which s/he or any member of the Assistance Unit (AU) or Budget Group (BG) may be entitled in order to be eligible for Medicaid.
BASIC CONSIDERATIONS	<p data-bbox="557 415 1451 485">Application for other benefits must be made prior to the approval of the Medicaid application.</p> <p data-bbox="557 527 781 560"><b>EXCEPTIONS:</b></p> <ul data-bbox="557 602 1451 1157" style="list-style-type: none"><li data-bbox="557 602 1451 821">• Application for other benefits is not required for the following COAs:<ul data-bbox="654 674 959 821" style="list-style-type: none"><li data-bbox="654 674 959 707">- Newborn Medicaid</li><li data-bbox="654 711 959 745">- TMA</li><li data-bbox="654 749 959 783">- RSM PgW</li><li data-bbox="654 787 959 821">- Q Track</li></ul></li><li data-bbox="557 863 1451 968">• A pregnant woman applying for or receiving benefits under any COA other than RSM PgW who is in the second trimester of pregnancy is not required to apply for UCB.</li><li data-bbox="557 1010 1451 1043">• Family Medicaid COAs do not require application for SSI.</li><li data-bbox="557 1085 1451 1157">• Applications for other benefits that would result in an overall reduction of current income are not required.</li></ul> <p data-bbox="557 1192 1451 1264"><b>NOTE:</b> Advise the applicant of potential benefits, even if application is not required.</p> <p data-bbox="557 1306 1451 1377">Failure or refusal to apply for and accept other benefits results in ineligibility for ABD Medicaid COAs.</p> <p data-bbox="557 1419 1451 1491">Failure or refusal to apply for and accept other benefits results in the following actions for Family Medicaid COAs:</p> <ul data-bbox="557 1526 1451 1673" style="list-style-type: none"><li data-bbox="557 1526 1451 1598">• If the potential benefit is for a parent, exclude the parent and everyone for whom s/he is financially responsible.</li><li data-bbox="557 1640 1451 1673">• If the potential benefit is for a child, exclude only the child.</li></ul> <p data-bbox="557 1715 1451 1885">An individual in a Family Medicaid COA who fails to apply for other benefits may be eligible for another Family Medicaid COA in which the application for other benefits is not required. Complete a CMD prior to denial or termination of Medicaid and document the results of the CMD.</p>

**BASIC  
CONSIDERATIONS  
(cont.)**

The A/R must apply for the highest possible benefit for which s/he is eligible, and must accept a benefit for the earliest month it is available. In addition, the A/R must comply with all requirements set forth by the agencies issuing the other benefits. These agencies include, but are not limited to: Department of Labor, Social Security Administration, and Veteran's Administration.

AU members are required to apply for UCB only if Clearinghouse indicates potential eligibility.

Application for VA Compensation or VA Pension must be made by individuals who may be eligible for either benefit. VA Pension applicants may choose either to project estimated medical expenses (prospective) or claim medical expenses for the past year (retrospective).

**EXCEPTION:** A/Rs who are currently receiving a VA Pension do not have to file a special application for the New Improved Pension.

Benefits and income are not synonymous terms. Benefits include, but are not limited to the following:

- UCB
- annuities
- disability payments, including RSDI, SSI and Worker's Compensation
- pensions
- unprobated estates

Benefits do **NOT** include the following:

- alimony
- child support
- Medicare
- payments on loans or promissory notes
- rent

The A/R is **NOT** required to apply for the following benefits:

- TANF
- benefits from a trust over which the A/R has no control
- Earned Income Credit (EIC)
- non-receipt of court ordered child support/alimony
- Prouty (Special Age 72) RSDI benefits
- Veterans Aid and Attendance
- Veterans Household Allowance
- Widow(er)'s Year's Support

**NOTE:** Refer to Section 2400, Income, for more detailed information about specific types of income.

**PROCEDURES**

Determine those benefits to which the A/R may be entitled by asking the A/R about employment history, military service, etc., of the applicant, AU members and any person through whom the applicant or AU members may be entitled (i.e., spouse or parent).

Advise the A/R or PR of other benefits to which the AU may be entitled and refer the A/R to the appropriate agency to apply. Do not refer A/R to apply for SSI if you know s/he will not be eligible (example: Katie Beckett child whose parents' income/resources exceed the SSI limit or aliens who don't meet the criteria for SSI eligibility).

Assign a reasonable deadline for the A/R to apply for the other benefits and to provide verification that the application was made.

Verify with one of the following:

- approval or denial letter
- documentation verifying proof of application
- contact with the agency where the application was filed.

If the applicant is eligible on all other points of eligibility, do not delay approval of an application awaiting the approval/denial of the application for other benefits.

Schedule an interim review to verify the status of the application for other benefits if the application is still pending at time of approval.

Exclude an adult and anyone for whom s/he is responsible if the adult fails or refuses to apply for other benefits. If the other benefits are for a child, exclude only that child.

**NOTE:** For Family Medicaid COAs, the A/R's verbal or written statement that s/he will apply or has applied for other benefits is sufficient to meet this requirement. This is applicable at application, review, or interim change.

For ABD and Family Medicaid COAs, follow-up is required in the third month following the month that potential eligibility is indicated. For Family Medicaid, verification of the application for other benefits must be obtained at this time. This is not required for ABD COAs as verification of application for other benefits was obtained at application or review.

Document that an A/R must apply for other benefits, the deadline by which this must be done, verification, if required, and the effect on the eligibility. Document the reason why the AU was not required to apply for any potential other benefits; the type of benefit (e.g. UCB) and why application was not required.