Case Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Case Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ET:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Section A - Non-Financial Screening**

Answer yes or no to each question for ***every*** household member

1. Is this person an Alaska resident? \_\_\_\_\_
2. Is this person a United States citizen, US national, or has satisfactory immigration status? \_\_\_\_\_  
   **\*\* NOTE : verification required – see MS 5720-2**\*\*
3. Was this person in state or tribal foster care and receiving Medicaid in the State of Alaska when they turned 18? \_\_\_\_\_  
   Are they also under age 26 and not eligible for any other Medicaid category? \_\_\_\_  
   **If the answer to BOTH these questions is ‘YES” , this person will be determined eligible per MS 5704.**

***If no to all questions, there is no MAGI Medicaid eligibility. Refer the individual to the FFM (Federally Facilitated Marketplace) and continue with the next household member.***

1. Does this person have a social security number? \_\_\_  
   If no, the client can still apply for Medicaid but they will need to provide before Medicaid can be approved.

**Section B** – **MS 5710-1 & 2**

**Non-Filer Rules**

The **Non Filer Rules** are used for someone who is not expected to be required to file a federal income tax return, and or is not expected to be claimed as a tax dependent. Non-Filer rules are similar to Family Medicaid eligibility rules we use now.

There are new rules that lay out specifically who counts in the applicant’s household, called “relationship- based rules”. Under new relationship-based rules, the household continues to be based on the family members who live with the applicant to include stepparents & step children. **Continue to section D and calculate countable income for each household member.   
   
 If the Individual plans to file a Federal Income Tax Return move to Section C to determine the MAGI household composition.**

**Section C – MS 5710-1 & 2**

Tax Filer HH Rules, Tax Dependent HH Rules & Tax Dependent Exception Non-Filer HH Rules

Household composition is determined separately for **each individual** in the household.

Once household status is determined for each *individual* move on to section D

**Section D – MS 5710-3**

MAGI Income Rules

Generally, MAGI income of all individuals in a household must be counted toward household income; there are two exceptions when income is not considered even if the individual is part of the household composition:

* Income of most children not expected to be required to file a federal income tax return
* Income of most tax dependents not expected to be required to file a federal income tax return.

Reminder – PFD counts for MAGI Medicaid. If client received 2013 PFD divide by 12 and include as UNIN

**Fill out the worksheet on the next page to put in the case file.**

Case Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Case #\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_

***For each family member, use MS 5710-3 AND 5715-2&3 to complete the chart(s) on this page.***

**Household Composition**  **Determine MAGI Income**

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Gross EAIN $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Filing Status \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Gross UNIN $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Pre-Tax Payroll Deductions $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Monthly MAGI Based Income $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Gross EAIN $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Filing Status \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Gross UNIN $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Pre-Tax Payroll Deductions $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Monthly MAGI Based Income $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Gross EAIN $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Filing Status \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Gross UNIN $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Pre-Tax Payroll Deductions $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Monthly MAGI Based Income $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Gross EAIN $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Filing Status \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Gross UNIN $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Pre-Tax Payroll Deductions $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Monthly MAGI Based Income $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Gross EAIN $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Filing Status \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Gross UNIN $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Pre-Tax Payroll Deductions $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Monthly MAGI Based Income $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Now that you have determined the household status and countable monthly income, proceed to the EXCEL spreadsheet and input the information you have gathered to determine MAGI Eligibility.**

**Attach page 3 of this worksheet to the CLPM/CAP2 and put in the file.**

**Following the CANO Format in Administrative Procedures Manual Section 109A, enter a case note (CANO) indicating that MAGI Medicaid was determined.**

