

NEW YORK STATE WELFARE MANAGEMENT SYSTEM

**MABEL BUDGETING MANUAL
MEDICAL ASSISTANCE PROGRAM**

**NEW YORK STATE DEPARTMENT OF HEALTH
OFFICE OF HEALTH INSURANCE PROGRAMS**
Bureau of Downstate Eligibility

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INTRODUCTION

Medicaid Automated Budgeting and Eligibility Logic (MABEL), which is part of the Welfare Management System (WMS), is a computerized system designed to calculate Medicaid (MA) budgets to assist the Medicaid Eligibility Specialist in determining eligibility. The budgets are calculated in accordance with the rules and regulations of the New York State Department of Health.

Budget information for the MA household is keyed into a terminal connected to WMS computer, which uses the information to perform the budget calculations resulting in budget summaries. The budget summaries reflect all information entered into the system and serve as an aid to the worker in determining client eligibility and MA benefits.

MABEL Budgeting is a means of calculating a MA budget and determining eligibility using the Medicaid Automated Budgeting and Eligibility Logic of WMS, with actual storing and saving of all information entered into the computer. MABEL also has a Scratchpad capability which performs a budget calculation, but does not permit storage.

In order to use the system, the worker must have knowledge of MA budgeting rules and regulations.

Listed below is a selection of *MABEL* Budget Types and the categorical requirements:

Budget Type 01 - LIF/ADC Related (Household with Children Under 21)

- Emancipated Minors - Must be at Least 16 Years of Age
- Pregnant Women - **EXPANDED ELIGIBILITY**
- Infants Under 1 Year - **EXPANDED ELIGIBILITY**
- Children Between 1 and 18 Years - **EXPANDED ELIGIBILITY**

Budget Type 05 - SSI Related and LIF/ADC Related

- Any of the above criteria and a SSI-Related Individual (Except an emancipated minor)

Budget Type 02 - S/CC (Single Adults and Childless Couples)

- Adults 21-64 (not disabled)

Budget Type 06 - SSI Related and S/CC

- Adult 21 - 64 (not disabled) and a SSI-Related Spouse

Budget Type 04 - SSI Related (SSI-Related Individuals)

- 65 and Over (OAA)
- Certified Disabled (AD)
- Certified Blind (AB)

The following Budget Types are used for *Nursing Homes and Hospital In-Patient Only*:

Budget Type 07 - Chronic Care Individual**Budget Type 08 - Chronic Care and SSI-Related.****Budget Type 09 - Chronic Care and LIF/ADC Related****Budget Type 10 - Chronic Care and S/CC**

At this time, there are certain types of cases that *cannot* be budgeted in MABEL in New York City. These include:

Married Couple in Chronic Care***Cases with More Than Two (2) Earned Incomes******Cases Where Dollar Amount of Resource or Income Exceeds 7 Characters***

OVERVIEW

The MABEL Budgeting Manual is a reference guide designed to assist the Medicaid Eligibility Specialist in the use of the Medicaid Automated Budgeting and Eligibility Logic (MABEL) System of WMS.

Every WMS screen is identified by an alphabetic prefix. To use MABEL Budgeting, the worker enters information on up to five (5) screens at the WMS terminal. Two screens are access screens which are used in all WMS/MA systems. The first is a LOG-ON screen used by the worker to “sign-on”. The second is the Host System Menu Screen, NWMM00, from which the worker selects the budget option “04 - MABEL” in order to perform MABEL Budgeting, store the information entered into the computer, and utilize the stored information in the authorization of Medicaid benefits. MABEL also has a “Scratchpad” function that permits calculation of budgets which will not be stored or used in the authorization process.

The third screen displayed is the MA Budget Calculation screen, WBMAMU, from which the worker selects function 2 and enters a case number to access MA Pending Budgets screen or enters case number and version # to access Budget Record screen containing a case number only.

The Budget Record screen is used to record information on the MA case regarding needs, earned/unearned income and resources.

Upon completion of the Budget Record screen, the budget summary screen (s) is displayed. Upon request, printers linked to the WMS terminals can be used to provide prints of budget summaries (on demand) and provide print-outs of any screen used in the process.

If a case has variable earned income the worker may alternately select the Income Averaging screen from the Budget Calculation Menu, using this screen to obtain an average monthly earned income. This income information may be transferred to the Budget Record screen by use of an “F” Key.

This *manual* consist of screen, field and code descriptions used by the system to calculate a MA budget as well as case examples for each budget type. This *manual* also includes sections on errors and error correction and special procedures for resources.

KEYBOARD ACCESS and MENUS

This description is based on WMS Legacy System terminal and keyboard equipment. If PC based system is utilized see **PC Keyboard**.

SIGNING ON

Utilize normal sign on procedure (User ID/Password)

SPECIAL FUNCTION KEYS

Special Function Keys (F) are activated by pressing the FCTN key and Shift or Ctrl Key at the same time.

- F-1 Pages back from the Budget Summary screen to the **Budget Record screen** used for access to do a budget calculation.
If the case is on the Database, the activation of F-1 will return a budget entry screen with case name, case number/registry number, office, unit ID and worker ID displayed. The remainder of the screen will be blank.
If the case budget is not on the Database the activation of F-1 will return the Budget Record screen with only the case number/registry number displayed. The remainder of the screen is blank.
- F- 2 Pages back from the Budget Summary screen to the **Entry screen** that has the information used for this summary screen. Changes, additions, or deletions can be made on this screen.
(PC Keyboard) Return to Pending MA Budget Record.
- F- 4 **(PC Keyboard)** Move to or from Income Averaging.
- F- 8 Pages forward to **Budget Summary Screens** that are appropriate for the Budget Type. This key can only be used when Budget Type is 05 – 07.
(PC Keyboard) Toggle Between MA Budget Summary and Expanded Eligibility or MA SSI Screen.
- F-13 Stores the calculated budget on the Database from any summary screen. When F- 13 is used to transmit a budget to the database, the following **message appears** on the screen:
Budget Record Updated to Version _#.
- F-16 Pages back from the Budget Record screen to the **MA Budget Calculation screen**. Pages back from any Budget Summary screen to the MA Budget Calculation screen.
Pages back from the Budget Calculation screen to the Host System Menu.
- F- 6 Can be activated from any menu or budget screen to **Sign Off** the terminal.

WMS Access VIA PC Keyboard

Ctrl & Shift F3 - Update & Store.

Ctrl & F6 - Return to Prior Menu (Blank Fields)

Ctrl & F5 - Return to Prior Menu

Ctrl & F9 - Print Screen Dump

KEYBOARD ACCESS and MENUS

SPECIAL FUNCTIONS KEYS (cont'd)

INCOME AVERAGE KEYS

- F-18 Prints MABEL Budget Report in English.
- F-19 Prints MABEL Budget Report in English and Spanish.
- F- 4 Moves averaged income and deduction amounts to the Budget Record (*WBMAWB*) screen. A “Y” will appear in the **A** field on the Budget Record screen to indicate that income/deduction information appearing has been system generated as a result of income averaging.

Returns IA screen from Budget Record or any of the Budget screens.

NOTE: If data has been recorded for both income 1 and 2, F-4 will move both incomes to the Budget Record screen. Also, if the Budget Record screen contains earned income data from previous transactions, F-4 will overlay this data with new information from the IA screen.

- F- 1 Displays IA screen for Earned Income 1.
- F- 2 Displays IA screen for Earned Income 2.

NOTE: When viewing a current budget, function keys F-1 through F-4 are not allowed.

WMS HOST SYSTEM MENU (NWMM00)

There are many options available on the Host System Menu screen. To perform MABEL budgeting enter selection "04" MABEL and press the Enter/Transmit key. The MA Budget Calculation Menu Screen (WBMAMU) will be displayed.

```
NWMM00 (P)                WELFARE MANAGEMENT SYSTEM                02/15/06
                           HOST SYSTEM MENU

Selections:
 01.....Inquiry
 02.....PA/FS Budgeting
 03.....Applications
 04.....MABEL
 05.....Worker Batch Functions
 06.....Child Support Management System
 07.....Worker Case Update Functions
 08.....Medical Assistance Menu
 09.....COMMON BENEFIT ID CARD SUBSYSTEM
 10.....Archive Retrieval Menu
 11.....TIME LIMIT TRACKING MENU
 12.....Client Notice System
 13.....MAPPER APPLICATIONS
 14.....SSA 40 QUARTER MATCHING
        Enter Selection #
        Or 6-Character Transaction Code
```

MA BUDGET CALCULATION MENU (WBMAMU)

On the MA Budget Calculation Menu screen (**WBMAMU**) the worker can select options 1 through 7 to complete the appropriate action to be taken. Type the Case Number or Case Number and Budget Version in the Case No. and Ver field. Depress the XMT key to obtain the appropriate screen.

WBMAMU		WMS MA BUDGET CALCULATION MENU				
FUNCTION ^	CASE NO. ^^^^^^^^^	REGISTRY NO. ^^^^^	DIST ^^^	VER ^^	XMT ^	
FUNCTION (SELECT ONE)						
1	DISPLAY BUDGET RECORD - CURRENT					
2	DISPLAY BUDGET RECORD - PENDING					
3	INCOME AVERAGE					
4	BOTTOM LINE					
5	DELETION - BUDGET RECORD					
6	DELETION - BOTTOM LINE					
7	CALCULATE PENDING BUDGET					

Budget Record

Is the screen on which needs, income and resources are entered. If a "1" (**CURRENT**) is entered in the function field, the **CURRENT** MA Budget (**WBGTM**) screen will be displayed and appropriately labeled to the right of the screen label (**CURRENT**).

If "2" (**PENDING**) is entered in the function field the MA Pending Budgets (**WBM**) screen will be displayed. This screen list existing pending budgets. If a pending budget version number also is entered, the **PENDING** MA Budget (**WBGTM**) screen for that budget version will be displayed. Key **Shift F2** will return the input screen for that budget version number.

DISPLAY BUDGET RECORDED - CURRENT

Entry of a "1" will return the "**CURRENT**" budget summary screen(s) labeled "CURRENT". This label indicates that a *current* budget exists, has been requested and is being displayed. If no current budget exist the message "NO CURRENT BUDGET EXIST" is displayed. The current budget remains unaffected until replaced during the authorization (CEM/Batch Update) process.

DISPLAY BUDGET RECORD - PENDING

Entry of a "2" will return the display screen labeled "**MA PENDING BUDGETS**". This screen will display up to three existing pending budgets, with the Version number, Budget Type, Date Stored and Effective Date fields. If no pending budget exist the message "NO PENDING BUDGETS FOUND" will display.

NOTE: When viewing a Current Budget Summary screen, function keys F-1 through F-4 are not allowed.

MA BUDGET CALCULATION MENU (WBMAMU)

The accompanying chart is an outline of how the MA Budget Calculation Menu is used when calculating or reviewing MABEL budgets. It is designed to provide the worker with a handy and easy-to-use guide when executing a transaction, which involves gaining access to current and pending budgets during the MABEL budget calculation process. When the worker selects a function “1” or “2”, the system’s response will be as shown in the response column.

FUNCTION SELETED RESPONSE	EXISTING CONDITIONS	SYSTEM
1. Budget Record Current	Only current budget exists	Budget summary screen labeled “Current”
	Only pending budget exists	Message “No Current Budget Exists”
	Current and Pending budgets exist	Budget Summary Screen labeled “Current”
2. Budget Record-Pending	Only Pending budget exists	MA Pending Budgets Screen
	Only current budget exists	Message “No Pending Budgets Found”
	Current and pending budgets exist	MA Pending Budgets Screen

INCOME AVERAGE

This function provides the worker with an automated capability to compute quickly and efficiently the monthly average of variable earned income and related deductions prior to the actual budget process.

BOTTOM LINE

Used (in PA-only) to calculate PA Budgets with rent over maximum allowance.

DELETION - BUDGET RECORD

This option is not available to NYC.

DELETION - BOTTOM LINE

This option will delete a Bottom-Line Budget.

CALCULATE PENDING BUDGET

This function allows the creation of a new pending budget or the recalculation of an existing pending budget. If creating a new pending budget with no existing *CURRENT* or *PENDING* budgets these fields will be blank with the exception of the case number.

If recalculating an existing *PENDING* budget the screen will be populated with the last information stored for that *PENDING* budget version.

If only a *CURRENT* budget exist the fields on the new Pending MA Budget Record (WBMABW) screen will be populated with the information from the *CURRENT* budget.

The system will allow up to three existing pending budgets to be stored at any one time. If 3 pending budgets already exist the message “MAXIMUM of 3 PENDING BUDGETS” will be displayed. The pending budget is stored from this function via F-13.

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INPUT SCREENS

BUDGET RECORD SCREEN - WBMAWB

This screen is the Pending MA Budget Record Screen. This screen is used to input information about the clients budget unit which is used to calculate a MABEL budget. The information entered here can be *changed, updated or stored.*

WBMAWB	PENDING MA BUDGET RECORD										VERSION 02		BUDGET TYPE										
CASE NAME											CASE NO.	OFC UNIT	WRKR	TRAN	EFFECTIVE PER.	MO							
SHEHO											020025516E	500 TRN	00014		TO								
CA EEC	EDC1	EDC2	AI	FUEL	TY	SHELTER:	TY	AMOUNT	WATER	AMOUNT	ADD:	TY	AMOUNT										
-SSI-	DM	LA	NO-DM	NO-ALL	BUY	PASS	-CHRONIC-	DATE	INS	PIA	CON	AMOUNT	LOC										
EARN	A	LN	CTG	N	I	EID	SRC	PER	T	GROSS	INSUR	CT-SUP	WK-REL	IRWE									
INC 1																							
CHILD			MOYR		AMOUNT			MOYR		AMOUNT		MOYR	AMOUNT										
CARE																							
EARN	A	LN	CTG	N	I	EID	SRC	PER	T	GROSS	INSUR	CT-SUP	WK-REL	IRWE									
INC 2																							
CHILD			MOYR		AMOUNT			MOYR		AMOUNT		MOYR	AMOUNT										
CARE																							
U	LN	C	N	I	SR	P	AMOUNT	CD	EXMPT	CD	EXMPT	LN	C	N	I	SR	P	AMOUNT	CD	EXMPT	CD	EXMPT	
I																							
N																							
C																							
RESCS	LN	CTG	N	I	CD	RES-VAL	LN	CTG	N	I	CD	RES-VAL	LN	CTG	N	I	CD	RES-VAL					

Following is a description of all fields that appear on the Pending Budget Record screen:

BUDGET RECORD SCREEN – WBMAWB

- VERSION** Version Number - System Generated. Indicates the number of the budget currently stored on the Database for the case number entered. If no budget has previously been stored, this field will be blank.
- BUDGET TYPE** Budget Type - is always required. Enter the appropriate code to identify the type of budget to be calculated.
- CASE NAME** Case Name - Enter the Case Name (up to 25 characters) as determined by local district procedures.
- CASE NUMBER** Case Number - System Generated.
- OFC** Office - Enter appropriate Office ID.
- UNIT/WRKR** Unit/Worker - is always required. Enter Unit ID and/or Worker ID as determined by local procedures.
- TRAN** Transaction Type - Enter appropriate transaction type: (02) Opening, (03) Reject, (05) (output), (07) Change, (10) Reopening.
- EFFECTIVE PER** Effective Period -is always required. Enter the effective FROM and TO dates to be covered by this calculated budget (MM/DD/YY) to (MM/DD/YY). (Unborn only case not allowed) Always use the first day of the month to the last day in the month. The maximum allowable effective period is 12 months.
- MO** Months Excess Available - an entry here will calculate the amounts of the excess income for the number of months entered. Acceptable values range from 2 to 6. This field is only used for Budget Type 01, 04, 05 and 06.
- CA** Number in Case - is always required. Enter the number of individuals in the budgeting unit.
- ECC** Expanded Eligibility Code - An entry in this field of "A", "B", "C", "E", "D", "F", "H", "I", "J", "K", "N", "P", "S", "T" or "W" indicates that the calculated budget is based on an Expanded Eligibility determination. These codes are applied as follows:

BUDGET RECORD SCREEN – WBMAWB

<u>ECC cont'd</u>	<u>Expanded Eligibility Codes</u>	<u>Description</u>
	A	AHIP (AIDS) Insurance Compares net income to 185% of the Federal Poverty Level. <i>(Budget Type 04 only)</i> .
	B	All categories <i>(Budget Type's 01 and 05)</i> . See C, D, F, H, I, P and S. Effective date 10/1/90.
	C	Child (ren) Calculate total Net Income. Compare household net income to 133% of the federal poverty level. <i>(Budget Type's 01 and 05 only)</i> . Effective From date must be 10/1/90 or later. If a child in the budgeting unit has income, enter a number for the child whose income is being recorded.
	D	Child(ren) who are at least six years old and have not reached their 19 birthday. Compare net income to 100% FPL <i>(Budget Type's 01 & 05)</i> . Effective 4/1/05.
	E	Disabled Adult Child.
	F	FHP Families. Compare net income to 133% - 150 %of Federal Poverty Level.
	H	COBRA Insurance compare net income to 100% Federal Poverty Level. <i>(Budget Type 04 only)</i> .
	I	Infants birth up to one year. <i>(Budget Type's 01 & 05)</i> . Compare household net income to 100% and 200% of the FPL.
	J	Medicaid/Family Planning Program Income eligibility at 200% of the FPL <i>(Budget Type's 01,02 and 04)</i> . Calculation should be performed when code B or D is entered.
	K	Family Planning Benefits Program Only. Income eligibility at 200% of the FPL <i>(Budget Types 01,02 and 04)</i> .
	N	FHP for 19 - 20 years old not living with Parents currently 100%.
	P	Pregnant Women and Infants. Compare total net income to 100% or 200% of the federal poverty level. <i>(Budget Type's 01 only)</i> . Effective From date must be 1/1/90 or later.
	S	FHP for S/CC currently 100% of Federal Poverty Level.
	T	Transitional Medical Assistance. Compare the adjusted gross earned Income to 185% of the FPL. (BT's 1) Effective From dates must be 4/1/90 or later. TMA does not apply to S/CC.
	W	Medicaid Buy-In for Working People with Disabilities.
<u>EDC 1</u>	<u>Expected Date of Confinement</u> -	Enter the expected date of confinement when there is an unborn(s) on the case. The budget summary screen will generate \$50 when appropriate, when computing the PA standard of need. The amount of the MA level will be increased by one.
<u>EDC 2</u>	<u>Expected Date of Confinement</u>	If there are two pregnant individuals the <u>EDC2</u> field is used.

BUDGET RECORD SCREEN – WBMAWB

- AI** Age Indicator - Enter appropriate indicator. (*Budget Types 02 and 06*).
See "AGE INDICATOR (AI)" on page G-3.
- FUEL TY** Fuel Type - Enter appropriate Fuel Type. See "fuel type (FUEL TY)" on page G-3.
- SHELTER TY** Shelter Type - Shelter Type and amount are required fields for Budget Types 01, 02, 05 and 06. Enter appropriate shelter type code. See "shelter type (ty)" on page G-4.
- AMOUNT** Shelter Amount - Enter total actual monthly amount paid for shelter. If there is no shelter cost enter zero (0).
- Note: THIS FIELD MAY BE LEFT BLANK ONLY WHEN BUDGET TYPE IS 04, 07 AND SHELTER FIELD IS BLANK OR WHEN THE SHELTER TYPE CODE IS 15, 16, 23, 28 OR 34. IN ALL OTHER SITUATIONS IF SHELTER AMOUNT IS ZERO, A 0 MUST BE INPUT IN THE AMOUNT FIELD.**
- WATER AMOUNT** Water Amount - Water is included in rent in NYC.
- ADDITIONAL ALLOWANCES (ADD)** Additional Allowances (ADD) - Enter the appropriate Additional Allowance Type.
See "ADDITIONAL ALLOWANCE (ADD-TY)" on page G-1.
- AMOUNT** Additional Allowance Amount - Enter the monthly amount of the Additional Allowance, based on the allowance type code used:
- 01=\$29.00 Per Person**
02=\$47.00 Per Person
03=\$64.00 Per Person
13=\$36.00 Per Person
- For codes 01, 02, and 03 add \$36.00 to above amounts for pregnant women and Children. If the case is entitled to an Additional Allowance as indicated by one of the above codes, multiply the amount by the number of persons in the CA field before entry.**
- DM** SSI Deeming Code - Enter the appropriate code that will indicate to the system the deeming procedure to use in budgeting. This is a required field for (*Budget Types 04, 05, 06, 07*) i.e. SSI Related.
- LA** SSI Living Arrangement - Use of this code indicates to the system the correct H/H size to use during certain phases of the SSI budgeting process for MA Level or Federal Benefit Rate Level. This is a required entry for (*Budget Type's 04 thru 08*). See "" on page G-7.
- NO-DM** Number of SSI Related Children to Deem - Enter the number of SSI-related children (under 18 years old) in the case to whom income and resources are to be deemed. This field is used for BT's 04 –06. (Maximum number that can be entered is 4). Leave blank if not applicable.
- NO-ALL** Number of Non-SSI Related Children to Deem - Enter the number of Non-SSI-related children (under 18 years old) to whom income must be allocated before income is deemed to the SSI-related individual(s). This field is used for (*Budget Type's 05 and 06*) Maximum number that can be entered is 9. Leave blank if not applicable.

BUDGET RECORD SCREEN – WBMAWB

- BUY** Buy-In Determination - Enter correct code to generate calculation of Buy-In eligibility. Valid for (*Budget 04 - 07 only*).
- DT INS** Date of Institutionalization - Enter the date the person became institutionalized. This field is a required entry for Budget Type 07.
- PIA** Personal Incidental Allowance - Enter the appropriate code to indicate the amount of the Personal Incidental Allowance to be budgeted. See “personal incidental allowance codes (PIA)” on page G-2.
- CON** Spousal Contribution Code - Enter the appropriate code to indicate the spouse’s contribution to the cost of care. See “Spousal contribution codes (con)” on page G-2.
- AMOUNT** Spousal Contribution Amount - If the spousal contribution code is 2, 3, or 4 the amount that the spouse is contributing is to be entered. If code 1 is used, the amount is a System Generated calculation.
- LOC** Local Code - Not applicable in New York City. Leave blank.
- EARNED INCOME**
- A** Income Average Indicator - When a “Y” appears in this field on the Budget Record Screen this indicates that income source, gross amount and related deduction information appearing on screen has been system generated as a result of Income Averaging.
- LN** Line Number - Enter the line number of person with the income for each occurrence of earned income.
- CTG** Categorical Indicator Code - Enter the appropriate code which indicates the categorical relatedness of the individual in receipt of the income. If there is earned income, an entry in this field is required for Budget Type’s 04 thru 10. See “CATERGORICAL IND CODES (CTG)- Earned/Unearned Income” on page G-1.
- N** Child Identifier - If a child in the budgeting unit has income, enter a number for the child whose income is being recorded. SSI related children can be assigned a value of 1 -4 Non-SSI related children can be assigned a value of 1-9.
- I** Chronic Care Indicator - If earned income is received by a person in chronic care enter “X” (May be used only for Budget Type’s 07)
- EID** Earned Income Disregard - If there is earned income, enter one of the following codes.
 1- Calculate LIF/ADC: Use if H/H was in receipt of MA under LIF or PA\MA during at least 1 month of the previous 4 and H/H is not entitled to either \$30 and 1/3 or \$30 disregard.
 4 - Calculate LIF/ADC-Related \$30 & 1/3: Use if H/H is entitled to receive \$30 and 1/3 disregard for up to 4 months.
 5 - Calculate LIF/ADC - Related: Use if H/H is entitled to receive \$30 disregard for up to 8 months.
 6 - LIF/ADC Related: Use for H/H which *did not* have MA under LIF or PA/MA during 1 month of the previous 4 months or whose PA, Transitional MA or Child support Extension expired (applicant only).
- SRC** Earned Income Source - Enter appropriate code for the source of the earned income as follows. See “earned income source (SRC)” on page G-2.

BUDGET RECORD SCREEN – WBMAWB

THE FOLLOWING INCOME ENTRIES MUST BE WITHIN THE TIME FRAME INDICATED BY THE PERIOD CODE.

- PER** Earned Income Period - Enter the appropriate period code for the income amount to be entered. When Income Averaging is used, period code (6) will be generated in this field.
- | | |
|----------------|--------------|
| 3 Weekly | 6 Monthly |
| 4 Bi-Weekly | 7 Bi-Monthly |
| 5 Semi-Monthly | 8 Quarterly |
| | 9 Yearly |
- I** Time Indicator - Enter the appropriate code. See "time code (T)" on page G-4.
- GROSS** Gross Income - Enter the individual's average Gross Amount of Earned Income for the period indicated by the Period code.
- INSUR** Health Insurance - Enter the Health Insurance costs paid for the period indicated by the Period Code. *(Not a valid entry for Budget Type 02).*
- CT-SUP** Court Ordered Support Payments - If appropriate, enter the monthly amount paid.
- WK-REL** Work Related Expenses - Expense disregard allowed for blind individuals (CTG 2 or 6) during SSI-related budgeting *(Budget Type's 04 thru 07).*
- IRWE** Impairment Related Work Expense - Enter the monthly amount of impairment related work expenses. Entry is allowed only when an individual has a categorical indicator code of 3 (Disabled) or 7 (SSI-Related Child-Disabled).
- CH-CR** Child Care - Enter the Child Care cost for the period indicated by the Period Code. For BT 04 enter the total child care expense in the first CHILD-CR OCCURRENCE. For the other budget types, enter the actual cost of child care paid per child.
- MOYR** Month and Year - Enter the month and year child was born.
- Note:** Enter the appropriate information for the second earned income as defined above.
- UNEARNED INCOME** Unearned Income - This field allows for entry of 6 unearned incomes.
- LN** Line Number - Enter the line number of person with unearned income for each occurrence of unearned income.
- C** Categorical Indicator - Enter the appropriate code which indicates the categorical relatedness of the individual in receipt of the income. See "CATEGORICAL IND CODES (CTG)- Earned/Unearned Income" on page G-1.
- N** Child Identifier - Enter a number for the child whose income is being recorded. Acceptable values of 1 – 9. SSI-related children can be assigned a value of 1 – 4. LIF/ ADC Related children can be assigned a value of 1-9.
- I** Chronic Care Indicator - Enter "X" if applicable to indicate that unearned income is received by a person in Chronic Care.
- SR** Unearned Income Source - Enter the appropriate Unearned Income Source Code. See "unearned income source (sr) cont'd" on page G-6.
- P** Period - Enter the appropriate Period Code.

BUDGET RECORD SCREEN – WBMAWB

<u>AMOUNT</u>	<u>Unearned Income Amount</u> - Enter the gross amount of the Unearned Income for the period indicated.
<u>CD</u>	<u>Unearned Income Exemption Code</u> - Enter the appropriate unearned income exemption code. Up to 2 exemptions can be entered for each unearned income source. See “unearned income exemption (exmpt)” on page G-5.
<u>EXMPT</u>	<u>Exemption Amount</u> - Enter the amount(s) to be exempted from the monthly gross unearned income. Amount (s) should be for the same period as the unearned income. When code (11) <i>One Third SSI Child Support</i> is used for an SSI related child(ren), this field is left blank. The system will calculate the correct 1/3 exemption amount.
<u>LN</u>	<u>Line Number</u> - Enter the line number of person with the resource for each occurrence.
<u>CTG</u>	<u>Categorical Indicator Code</u> - Enter appropriate code which indicates the categorical relatedness of the individual who owns the resource. This field is used for <i>Budget Types 04, 05, 06, 07 and 08 only</i> . See “ <i>CATEGORICAL IND CODES (CTG)- Earned/Unearned Income</i> ” on page G-1.
<u>N</u>	<u>SSI Related Child Indicator</u> - Enter a number to identify the SSI related child. Acceptable values are 1-4. If the child has income use the same number as assigned for earned or unearned income. This field is for <i>Budget Type 04</i> .
<u>I</u>	<u>Chronic Care Indicator</u> - Enter “X” if appropriate, to indicate the Resource is owned by a person in Chronic Care.
<u>CD</u>	<u>Resource Code</u> - Enter appropriate Resource Code. See “resources (CD)” on page G-3.
<u>RES-VAL</u>	<u>Resource Value</u> - Enter the value of each available resource that is not exempt.

Note: Enter the appropriate information for second unearned income as defined above.

After appropriate entries are made, press Enter key. If errors are present, the fields in error will appear as “blinking fields”. If the Budget Record Screen is error free, a MA Budget Summary Screen will result. The worker is able to store the budget by depressing Ctrl & Shirt F3 simultaneously.

MA INCOME AVERAGE ENTRY SCREEN (WBMAIA)

From the MA Budget Calculation Menu (WBMAMU) enter option "3" (Income Average). Type the case number in the Case Number field and depress the XMT Key. The following entry screen appears. The MA Income-Average Entry Screen(s) (WBMAIA) has been designed to provide workers with an automated capability to compute quickly and efficiently the monthly average of variable earned income and related deductions (over an eight (8) week period) prior to the actual budget process.

Since Income-Average data cannot be stored, the MA Income-Average Entry Screen for Earned Income 1 and 2 will always appear blank when accessed from WBMAMU.

WBMAIA		MA INCOME AVERAGE ENTRY				BUDGET TYPE	
CASE NAME		CASE NO.		OFC UNIT	WRKR	INC. AVG PERIOD	TO
LN	PERIOD	EARNED INCOME 1		SRC			
		GROSS INCOME	INSURANCE	CHILD CARE	CHILD CARE	CHILD CARE	
1	-	_____	_____	_____	_____	_____	_____
2	-	_____	_____	_____	_____	_____	_____
3	-	_____	_____	_____	_____	_____	_____
4	-	_____	_____	_____	_____	_____	_____
5	-	_____	_____	_____	_____	_____	_____
6	-	_____	_____	_____	_____	_____	_____
7	-	_____	_____	_____	_____	_____	_____
8	-	_____	_____	_____	_____	_____	_____
AVERAGE		_____	_____	_____	_____	_____	_____

XMIT _

The following pages will explain what information is entered on this screen to obtain an average income calculation.

MA INCOME AVERAGE ENTRY (WBMAIA)

<u>BUDGET TYPE</u>	<u>Budget Type</u> - Enter the appropriate budget type 01, 02, 04, 05, 06 and 07.
<u>CASE NAME</u>	<u>Case Name</u> - Record the name of the case as prescribed by local district procedures.
<u>CASE NO.</u>	<u>Case Number/ Registry Number/ Scratchpad</u> - Case Number, Registry Number or Scratchpad will appear on the screen as entered on the menu.
<u>OFC</u>	<u>Office</u> - Enter Office ID.
<u>UNIT and /or WRKR</u>	<u>Unit ID, Worker ID</u> - Enter Unit ID and/or Worker ID.
<u>INC AVG PERIOD</u>	<u>Income Average Period</u> - Record the "From" and "To" dates of the period for which the income is being averaged.
<u>LN</u>	<u>Line Number</u> - Enter the line number that corresponds to TAD line number of person with income.
<u>EARNED INCOME</u>	<u>Earned Income 1 or 2</u> -This field indicates in which occurrence of earned income on the Budget Record screen the average income/deduction amount(s) will be generated. In order to move from IA Earned Income 1 to IA Earned Income 2, an F function Key is used. F-1 will result in the IA Earned Income 1 screen and F-2 will result in the IA Earned Income 2 screen.
<u>SRC*</u>	<u>Earned Income Source</u> - Enter the appropriate earned income source code.
<u>PERIOD</u>	<u>Earned Income Period</u> - Enter the appropriate period code (3 – 6).
<u>GROSS* INCOME</u>	<u>Gross Income</u> - Enter the gross income for the period indicated. *NOTE: Income Occurrence one (Line 1) must always contain a period code and a gross amount for the system to calculate correctly.
<u>INSURANCE</u>	<u>Health Insurance</u> - Enter the Health Insurance cost paid for the period indicated by Period Code. <i>(Not valid entries for BudgetType 02)</i>
<u>CHLD-CR*</u>	<u>Child Care</u> - Enter the Child Care cost for the period indicated by the Period Code.

***Averaged amounts for these fields will be system generated, via F-4, to the MA Budget Record Screen.**

MA INCOME AVERAGE ENTRY (WBMAIA)

When all income/deduction data have been entered, the cursor is moved to the XMT position and the XMT UNPRT key is depressed. The monthly average income/deduction amount(s) will appear at the bottom of the screen. If changes are required to amounts initially entered on the screen, changes can be made and the screen re-transmitted. Since data entered on the Income Average screen is not retained even when the budget is stored, it is recommended that a screen print be taken if the worker requires a record of this action.

INCOME AVERAGE SPECIAL FUNCTIONS

Special Function Keys are activated by pressing the FCTN key and Shift Key at the same time.

F-4 Moves average income and deductions to MA Budget Record (WBMAWB). (A "Y" will appear in the "A" field on the MA Budget Record screen to indicate that income/deduction information appearing has been system generated as a result of income averaging).

Returns IA screen from Budget Record or any of the budget screens.

NOTE: If data have been recorded for both income 1 and 2, F- 4 will move information on both incomes to the Budget Record screen. (Also, if the Budget Record screen contains earned income data with new information from the IA screen)

F-1 Displays IA screen for Earned Income 1.

F-2 Displays IA screen for Earned Income 2.

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BUDGET DISPLAY SCREENS

MA BUDGET SUMMARY SCREENS - WBGTM

There are four MA Budget Summary Screens, which are labeled with the alphabetical prefix "WBGTM". The screens are as follows:

- MA Budget Screen
- MA SSI Budget Screen
- MA Chronic Care Budget Screen
- MA Expanded Eligibility

The following chart illustrates the MA Budget Screens calculated for each budget type:

CODE	DESCRIPTION	MA BUDGET SCREEN	MA SSI BUDGET SCREEN	MA CHRONIC CARE COMMUNITY BUDGET SCREEN	MA CHRONIC CARE BUDGET SCREEN	EXPANDED ELIGIBILITY
01	LIF Related	X				X
02	S/CC Related	X				X
04	SSI Related (AB/AD/OAA)		X			
05	SSI & LIF	X	X			
06	SSI & S/CC	X	X			
07	Chronic Care			X	X	

MA BUDGET SUMMARY SCREEN – WBGMA

VERSION Version Number - System Generated based on budgets transmitted to Database.

DISTRICT District - This is generated as NYC.

DATE Date - System Generated. This date is today's date.

TRAN Tran Type - System Generated based on CEM transaction.

CASE NAME, CASE NO., OFC, UNIT, WRKR, BT (*Budget Type*), **CA** (*Number of individuals in Case*), **EDC 1**, and **EDC 2** are displayed as entered on the ***Budget Record screen***.

NEEDS:

TY Type - Values displayed in this column reflect the shelter, fuel and additional allowance codes as entered on the Budget Record screen.

ACTUAL Actual Amount - Amounts appearing in this column represent the amounts as entered on the Budget Record screen.

ALLOW Allowance - The figures displayed in this column are the amounts entered if they are less than or equal to State maximum for the local district. Otherwise, the State maximum for the local district is displayed.

PRE-ADD Basic Allowance - The amount displayed is the basic needs for the number of individuals in the budgeting unit.

ENERGY ENRY/SUPP -The amount displayed is the Home Energy Allowance plus the Supplemental Energy Allowance for the number of individuals in the case.

SHELTER Shelter - Displays the amount of the shelter allowance. If the Shelter Type code is 01,03, 05 or 11 the amount displayed is the amount input if this amount is less than or equal to the State maximum allowable amount for shelter. Otherwise the State Standard amount is displayed. If the Shelter Type is 15 or 16 the amount displayed is the amount input.

WATER Water - If the Shelter Type is coded 01 or 03, the amount displayed is the amount input.

FUEL Fuel - If the Fuel Type code is other than zero, the amount displayed is the State standard for fuel.

ALLOW/
PREG Additional Allowance - If a date is entered in either the *EDC 1* or *EDC 2* field on the Budget Record screen, this field displays \$50 for each pregnancy, which is greater than three months duration. If an additional allowance is entered, the amount displayed is the sum resulting from the two entries. The combined amount appears as entered on the Budget Record screen.

MA BUDGET SUMMARY SCREEN – WBG TMA

- PA STD** PA Standard of Need -The amount displayed is the sum of the amounts in the allowance column.
- MA LEVEL** MA Level -The amount displayed is the standard amount according to the number of persons in the budgeting unit (including EDC 1 and EDC 2). This amount appears for *Budget Types 01 and 05*.
- TY** An * (Asterisk) - in the *TY* column (for BT's 01 and 05) identifies the Standard used to determine financial eligibility. The figure used is that which is most advantageous to the budgeting unit. An asterisk by the PA Standard indicates LIF eligible as of 11/97.

UNEARNED INCOME:

- LN** Line Number - Displayed as entered on Budget Record screen.
- SR** Unearned Income Source Code(s) -The code is displayed as entered on the Budget Record screen.
- P** Period -The code appears as entered on the Budget Record screen.
- AMOUNT** Unearned Income Amount(s) - Regardless of the period code, the figure displayed is always computed as a monthly amount.
- CD** Unearned Income Exemption Code -The code appears as entered on the Budget Record Screen.
- EXEMPT** Unearned Income Exemption -The amount is displayed as entered on the Budget Record screen. For code 11 (One-Third SSI Child Support) the amount is not displayed.
- SUPPORT DISREGARD** Support Disregard - When the \$50 Support Disregard is applied the amount of the disregard (maximum of \$50) will be displayed on the screen in this location. (This field is displayed only if Unearned Income Source 02 or 06 was entered on Budget Record Screen).

TOTAL NET UNEARNED

Total Net Unearned -The amount displayed is the net unearned income to be applied against the total needs.

***RESOURCES**

- LN** Line Number - Displayed as entered on Budget Record Screen.
- CD** Resource Code - Resource Code as entered on Budget Record Screen.
- RES-VAL** Resource Value -The amount(s) appears as entered on the Budget Record Screen.
- TOTAL RESOURCES** Total Resources -The amount displayed is the sum of the resource values.

**For detailed information regarding Resources and how they appear on the screen, see the Special Procedures section of this manual. (Page E1, E2, and E3).*

MA BUDGET SUMMARY SCREEN – WBGTM

EARNED INCOME:

<u>\$90.00</u>	<u>\$90.00 Disregard</u> - \$90.00 Disregard is a Work Related Expenses. One \$90.00 disregard is allowed for each employed H/H member.
<u>EID</u>	<u>Earned Income Disregard</u> -The figure generated is 55% *effective 1/1/06 of the earned income minus the \$90.00 disregard or 30 if applicable.*The EID percentage is subject to yearly change.
<u>CHILD CR</u>	<u>Child Care</u> -The Child Care cost for the period indicated by the Period Code is generated.
<u>INSUR</u>	<u>Insurance</u> -The Health Insurance cost for the period indicated by the Period Code is generated.
<u>TOTAL DED</u>	<u>Total Deductions</u> -The figure displayed is the sum of the deductions, which are to be subtracted from the gross earned income
<u>TOTAL NET EARNED</u>	<u>Total Net Earned Income</u> -The figure displayed is the monthly amount of the earned income to be budgeted.

Note:

LN (Line Number), ***CT*** (NOT APPLICABLE IN NYC), ***EID*** (Earned Income Disregard), ***FICA***, ***TX*** (Taxable Income Code), ***M*** (Marital Status), ***EX*** (Tax Exemption), ***SR*** (Earned Income Source), ***P*** (Period), ***T*** (Time) fields appear as entered on the Budget Record Screen.

For ***S*** (FICA), ***TX*** (Taxable Income Code), ***M*** (Marital Status), and ***EX*** (Tax Exemption) the above is not applicable for cases with effective From dates of 1/1/91 or later.

GROSS, and **CHLD-CR** fields – regardless of the period code entered, the figures displayed are generated as monthly amounts.

MA BUDGET SUMMARY SCREEN – WBGTM

MA SUMMARY:

TOTAL NET

INCOME

Total Net Earned Income -Indicates the monthly amount of the combined net earned and unearned incomes.

CD/

MONTHLY

Code/Monthly Amount -The system generates an "X" and the amount of the monthly excess. If there is no monthly excess, there will be no code and a zero will be in the amount field.

MONTHS

EXCESS

Months Excess - For Budget Types 01, 04, 05 and 06 the system will display the monthly excess amount multiplied by the number, which was entered in the MO field. If there is no entry in the MO field, this field is blank.

CD/EX

RESOURCES

Code/Excess Resources - If there is excess, this field will generate an "X" and the amount in excess of the Resource Level for the Budget Type. If there is no excess, a zero will be generated in this field.

EXPAND ELIG

Expanded Eligibility - Indicates level of eligibility for which case has been authorized.

EFFECTIVE

PER

Effective Period - In most cases, the FROM and TO dates are displayed as entered on the Budget Record Screen. However, the Effective Period will be blank for BT 02 and 06 if excess income and/or excess resources exist, or if the case fails the gross income test.

DATE

STORED

Date Stored - Indicates the date the saved budget is transmitted to the Database. This will be generated only when a budget has been stored.

NOTE:

Note: FOR BUDGETS WITH SPANNING DATES IN WHICH MA LEVELS, TAX TABLE AMOUNTS AND ALLOWANCE CHANGES OCCUR, SUCH BUDGETS WILL BE BASED ON THOSE FIGURES IN EFFECT ON THE EFFECTIVE "FROM" DATE OF THE CALCULATED BUDGETS.

The Worker can obtain a copy of this Screen by pressing the *Prior Case Next* key.

MA SSI BUDGET SCREEN - WBG TMA

VERSION Version Number - System Generated based on budgets transmitted to the database.

DISTRICT District - This is generated as NYC.

DATE Date -System Generated: This date is today's data.

TRAN Tran Type - System Generated based on CEM transaction.

*The following fields reflect what was entered on the **Budget Record Screen:***

CASE NAME	CA (Number in case)
CASE NO	DM (Deeming Code)
OFC	LA (Living Arrangement)
UNIT	NO-DM (Number of Children to Deem)
WRKR	
BT (Budget Type)	

UNEARNED INCOME:
 LN (Line Number)
 C (Categorical Indicator Code)
 N (Child Identifier)
 P (Period)
 I (Chronic Care Indicator)
 SR (Unearned Income Source Code(s))

AMOUNT Unearned Income amount(s) - Regardless of the period code the amount displayed is generated as a monthly amount.

CD Unearned Income Exemption Code. See page H-5 for Unearned Income Exemption Codes.

EXMPT Unearned Income -The amount displayed as entered on the Budget Record Screen.

EARNED INCOME: *The following fields appear as entered on the **Budget Record Screen:***

LN (Line Number)
 C (Categorical Indicator)
 N (Child Identifier)
 I (Chronic Care Indicator)
 SR (Earned Income Source)
 P (Period)

GROSS Gross Income -This figure is the gross monthly amount of earned income.

65 EXM AMT Taxes Exempt Amount -This figure is either the actual monthly taxes or \$65 including FICA & Disability, whichever is higher. This field will be blank for all cases with effective FROM dates of 1/1/91 or later.

COURT SUP Court Ordered Support - Court ordered support payments.

MA SSI BUDGET SCREEN – WBGMA

<u>BLND/ WK-RL</u>	<u>Blind Work Related Expenses</u> -This figure is the expense disregard for blind individuals during SSI-Related budgeting.
<u>½ REM</u>	<u>½ Remainder</u> -The figure displayed is ½ of the remaining earned income after appropriate deductions are subtracted.
<u>INSURANCE</u>	<u>Health Insurance</u> -The figure displayed is the Insurance Cost for the period indicated by the Period Code.
<u>TOTAL DED</u>	<u>Total Deductions</u> -The figure displayed is the monthly sum of the deductions from gross earned income.
<u>TOTAL NET</u>	<u>Total Net Earned Income</u> -The figure displayed is the amount of the earned income to be budgeted.
<u>RESOURCES:</u>	
<u>LN</u>	<u>Line Number</u> -The Line Number of person possessing resource.
<u>N</u>	<u>SSI-Related Child Indicator</u> -The code appears as entered on the Budget Record screen.
<u>RES-AMT</u>	<u>Resource Amount</u> -This figure is the total amount of Resources to a SSI related couple, individual or SSI-related child.
<u>DEM-AMT</u>	<u>Amount to be Deemed</u> -The figure displayed is the amount of resources which have been deemed from the parent(s) to the SSI related child.
<u>EXCESS</u>	<u>Excess Resources</u> -The figure displayed is the amount of excess resources over the MA resources level.
<u>ALLOCATION:</u>	
<u>NO OF CHILD</u>	<u>Allocation Number</u> -The number of children that were allocated appears as entered on the Budget Record screen under "NO-ALL".
<u>NS CH INC</u>	<u>Non SSI-Related (Child(ren) Income</u> -This amount is the total Non-SSI related child(ren)'s income(s).
<u>AFTER ALLOC</u>	<u>After Allocation</u> -The figure is the amount of the Non-SSI related spouse/parent income available after allocation.

MA SSI BUDGET SCREEN – WBGTM

MA SUMMARY:

PA STD PA Standard of Need -The sum of the amounts in the allowance column of MA Budget screen.

MA LEVEL MA Level - The system generated the appropriate MA level based on the code entered in the Living Arrangement field (LA).

TOT NET INC Total Net Income - The monthly amount of the combined net earned and unearned incomes. A code indicating where the \$20 SSI disregard was taken precedes the amount as follows:

- U** From unearned income
- E** From earned income
- B** From both earned and unearned income

CD/
MONTHLY Code/Monthly Amount -The system generates an “X” and the amount of the monthly excess. If there is no monthly excess, there is no code a zero is displayed in the amount field.

MONTHS
EXCESS Months Excess -The system displays the monthly excess amount multiplied by the number, which was entered in the MO field. If there is no entry in the MO field, this is blank.

The following MA Summary fields are for SSI Related children only:

MA LEVEL
CHILD MA Level for a SSI-Related Child -The system generates the MA Level for one.

AMT
DEEMED Amount to be Deemed -The figure displayed is the amount of the parent(s) income to be deemed to the SSI related child(ren).

N Child Identifier -This field displays a number for the child whose income is being recorded. An asterisk indicates that eligibility has been determined for an SSI Related Child without income.

TOT NET Child Total Net -The figure displayed is the monthly amount of income available to the child. This includes the child’s net earned and unearned income and also that amount which has been deemed for the parent(s).

CD/MON
AMT Code/Monthly Amount -The system generates an “X” and the amount of the monthly excess. If there is no monthly excess, there is no code and a zero is displayed in the amount field.

MA SSI BUDGET SCREEN - WBG TMA

EFFECTIVE

PER

Effective Period -The FROM and TO dates are displayed as entered on the Budget Record screen when the Budget Type is 04, 05 or 06. For BT 7 the system generates the appropriate dates based on the Date of Institutionalization.

DATE

STORED

Date Stored -The date the saved budget is transmitted to the Database.

The worker can obtain a copy of this screen by pressing the PRIOR CASE NEXT Key.

MA CHRONIC CARE BUDGET SCREEN

CASE NAME, CASE NO, OFC,UNIT, WRKR, BT (Budget Type), CA (Number of persons on case), EDC1, EDC2 are displayed as entered on the Budget Record Screen.

VERSION Version Number - System Generated based on budgets transmitted to the data base.

DISTRICT This is generated as NYC.

DATE System Generated; This is always the current date.

TR Transaction Type is system generated based on CEM transaction.

UNEARNED INCOME:

LN Line number of the person with the income.

C Categorical Indicator code.

I Chronic Care Indicator

N Child Identifier.

SR Unearned Income Source Code.

P Period code which indicates the frequency of the income.

AMOUNT Unearned Income amount.

CD EXEMPT Unearned Income Exemption code.

EARNED INCOME:

LN The line number of the individual with the earned income.

C Categorical Indicator code

I Chronic Care Indicator

EID Earned Income Disregard

SR Earned Income Source code.

P Period code which indicates the frequency of the income.

GROSS INC The amount of the earned income before deductions.

65 1/2 The gross income minus \$65.00 and the half of that remainder.

MO OF INST

TOTAL DED The total deduction from earned income in the first month of institutionalization.

MO OF INST

TOTAL NET The total Net earned income.

MO OF INST

CHRONIC CARE

TOT DED The amount of earned income after total deductions of the amount of deduction from earned income in the chronic care month.

CHRONIC CARE

TOTAL NET The amount of income after chronic care total deductions.

CONTRIBUTION

AMT The sum of the Chronic Care Total Net and the Unearned Income.

MA CHRONIC CARE BUDGET SCREEN

MA SUMMARY:

MO OF INST

TOT NET The total amount of earned and unearned income with the SSI related disregards deducted.

MA LEVEL/

PIA The MA level/ Personal Incidental Allowance.

CD/CONT TO

COMM

Contribution to the community - the Minimum Monthly Maintenance Needs allowance.

CONTRIB

TO COST

The amount of money paid to the institution by the applicant/recipient for the cost of care.

TOTAL TO

COST

The total amount paid to the institution by the applicant/recipient for the cost of care.

CHRONIC CARE

TOT NET

The total net income of earned and unearned income.

MA LEVEL PIA Personal Incidental Allowance, the applicant/recipient receives.

CD/CONT TO

COMM

Contribution to the community - the minimum monthly maintenance needs allowance.

CONTRIB TO

COST

The amount the applicant/recipient pays for the cost of care.

TOTAL TO

COST

The amount the applicant/recipient pays for the cost of care.

Note:

The first month or partial month of permanent absence from the community the institutionalized applicant/recipient is entitled to SSI related budgeting. The month following the month of institutionalization (the second month) Chronic Care budgeting is applied.

RESOURCES:

CD/EX REST

The amount of excess resources.

TO

The dates the resources will be in excess.

EXPANDED ELIGIBILITY/FHP SCREEN

The Expanded Eligibility screen is displayed for Budget Type 01(LIF/ADC-Related) and Budget Type 02 (S/CC) Single Childless Couples. Expanded Eligibility is calculated when an EEC code is entered on the budget input screen. Following is a description of the screen.

WBG	TMA	PENDING	EXPANDED ELIGIBILITY/FHP	VERSION 01	DISTRICT NYC	01/30/06
CASE NAME		CASE NO.		OFC	UNIT	WORKER BT EFFECTIVE PERIOD
MARGARET JONES		020004221G		559	USREF KEM09	01 010106 TO 093006
CA: 03		EEC: B		TOTAL NET INCOME:		121325
TOTAL FHP RES:		EXC FHP RES:		TOTAL FHP INCOME:		130325
				TOTAL FP INCOME:		121325
PREGNANT WOMAN:		ELIGIBLE		100%		166300
INFANT:		ELIGIBLE		100%		166300
CHILD 1-5 YEARS:		ELIGIBLE		133%		221200
CHILD 6+ < 19:		ELIGIBLE		100%		166300
FHP: FAMILY		ELIGIBLE		150%		249400/1845000
FAMILY PLANNING:		ELIGIBLE		200%		332500

EXPANDED ELIGIBILITY/FHP

<u>FIELD</u>	<u>EXPLANATION</u>
VERSION	System Generated, budget transmitted to database.
DISTRICT	NYC - System Generated
DATE	System Generated date budget was entered into system.
CASE NO.	Case number assigned by WMS
OFC	Office Location ID
BT	Budget Type
EFFECTIVE PERIOD	Dates the budget will cover.
CA	Number of persons on case.
EEC	Expanded eligibility code.
TOTAL NET INC	Monthly net income.
TOTAL FHP INCOME	Family Health Plus Income.
TOTAL FP INCOME	Family Planning Income.
PREGNANT WOMAN	Eligible at the 100% poverty level.
INFANT	Indicates the infant on the case who is EEC eligible at the 100% poverty level.
CHIL 1-5 YEARS OLD	Indicates child on case who is eligible at the 133% poverty level.
CHILD 6+ < 19 YEARS OLD	Indicates child on case who is eligible at 100% of poverty level.
FHP: FAMILY	Indicates eligibility at 150% of federal poverty level.
FAMILY PLANNING	Indicates eligibility at 200%.

MA PENDING BUDGETS (WBMAPB)

This screen is displayed if an entry of a 2 *DISPLAY BUDGET RECORD - PENDING* on MA Budget Calculation Menu (WBMAMU). The MA PENDING BUDGETS Screen will list up to three pending budgets, the VERSION number, BUDGET TYPE, DATE-STORED AND EFFECTIVE DATE.

WBMAPB		MA PENDING BUDGETS	
CASE #	020025516E		DATE 08/20/09
VERSION#	BUDGET -TYPE	DATE -STORED	EFFECTIVE -DATE
01	02	08/10/09	09/01/09 - 08/31/10

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SPECIAL PROCEDURES - RESOURCES

Effective January 1, 2010 the resource test will be eliminated for all FHP cases. The resource test will only be performed for MA cases with categories codes 10 (aged), 11 (blind), 12 (Disabled), 70 (MBI-Disabled Basic Group) and 71 (MBI-Medically Improved) regardless of age.

BUDGET TYPE 04: SSI-Related (AB/AD/OAA).

1. If the Deem Code is 1 (Deem to SSI Related Spouse) or 4 (No Deeming), enter a Categorical Code, Resource Code, and Resource Value.
2. If the Deem Code is 2 (Deem to SSI Related Child or 3 (Deem to SSI Related Spouse and SSI Related Child), enter a Categorical Code, an identification number for each SSI child with resources, Resource Code, and Resource Amount.

**OUTPUT
INFORMATION:**

1. If the Deem Code is 1 or 4:
Resources will be totaled and displayed in the Resource Amount field.
Amount in excess of the MA Resource Level is displayed in the EXCESS field. (Appropriate MA Resource Level is determined by the number in the Living Arrangement field).
2. If the Deem Code is 2:
Parent(s) resources will be totaled and generated in the first RES AMT field.
Resources available to each SSI related child will be totaled and generated in the RES AMT field starting on the second line.
NOTE: This amount will be the child's resource amount plus any amount deemed from the parent(s). If the SSI Related child has no resources, a zero will be displayed in the field.
The amount of the resources deemed from the parent (s) will be generated in the DM-AMT field. This amount is determined by comparing the amount of the parent's resources to the SSI Resource Level. The amount in excess of the Level is the amount deemed.
The amount of excess resources over the MA Resource Level for 1 is displayed in the Excess field for each child.
3. If the Deem Code is 3: Parent(s) resources will be totaled and displayed in the RES AMT field.
The amount of resources over the MA Level is in the EXCESS field.
For SSI child(ren) – same as SSI child(ren) in 2 above

SPECIAL PROCEDURES – RESOURCES

BUDGET TYPE 05:

SSI RELATED & LIF/ADC Related. The resources for the SSI portion of this Budget Type will require the same input as outlined for BT 04.

**OUTPUT
INFORMATION**

The Resources for SSI portion of this Budget will be calculated and displayed on the MA SSI Budget screen as outlined for BT 04. The Resources for the LIF/ADC-Related portion of the budget will be calculated and displayed on the MA Budget Screen as outlined BT 01.

BUDGET TYPE 06:

SSI Related S/CC Related. The resources for the SSI portion of this Budget Type will require the same input as outlined for BT 04.

**OUTPUT
INFORMATION**

The Resources for the S/CC portion will be calculated and displayed on the MA Budget Screen as outlined for BT 02.

BUDGET TYPE 07

Chronic Care. Enter the appropriate Categorical Indicator field, a Resource and a Resource Amount.

**OUTPUT
INFORMATION**

The Chronic Care individual's resources for Chronic Care budgeting; an X the date and the amount in excess of the Resource Level will be displayed in the second occurrence of resources on the Chronic Care screen.

ERRORS AND ERROR CORRECTION
IDENTIFICATION OF ERROR

There are three types of errors that may occur when entering a MA Budget.

- **System or Edit Errors**
- **Keyboard Lock Errors**
- **Key Stroke Errors**

A system or Edit error may occur because certain information entered is not correct or information that is required on the MA Budget Record Screen has not been entered. When the worker enters all the information on the screen and transmits, the computer checks all the data entered, one field at a time, to ensure that it is correct. If required information has been omitted, blinking asterisks will appear in the omitted fields. All errors on the screen must be corrected before the system will permit transmission to the Budget Summary screens.

In the process of reviewing the screen to determine how the error may be corrected, it is necessary to understand the three error checks or edits that the system performs.

- **Presence Edits**
- **Validity Edits**
- **Cross Check Edits**

Presence Edits: check for completion of must-fill fields. For example, if the CA (Number in Case) field is left blank depression of the "XMT" Key will result in an error identified by the appearance of a blinking asterisk. This means that this required field did not pass a presence edit check since it was left blank. It is up to the worker to fill in the appropriate number in the CA (Number in Case) field before re-transmitting the screen.

Validity Edits: check that information entered is in proper character type and proper range. An example of improper character type of information is when numbers are entered in the MA (Marital Status) field of the MA Budget Record Screen, which is designed to accept letters only. Such an entry will cause the cursor to remain in the field and a terminal alarm to sound. This is corrected by entry of a character of the proper type. An example of improper range of information is when the number "5" is entered in the NO-DEEM (Number of SSI Related Children to Deem) field on the MA Budget Record Screen. Since the maximum Number that can be entered is "4", an entry of "5" will result in an error. In the case where the information was of improper character type, an immediate correction is required in order to continue. In the case where the information was of improper range, a correction is required before transmission of the screen.

Cross Check Edits: check for the validity of combinations of entries in two or more fields. For example, if the Budget Type is 01 and entries are made in the Gross Income and related fields, an entry in the EXM field will be identified as an error, i. e. both fields will blink upon transmission. A correction is required before transmission of the screen is possible.

IDENTIFICATION OF ERROR

Keystroke Errors: unlike system errors, will not necessarily provide an alert that an error has occurred. A keystroke error may be considered a “silent error”. Since no error condition occurs, there are no blinking fields and the keyboard does not lock. It is up to the worker to review the screen for accuracy to determine if indeed an error has been made.

An example of a keystroke error is an entry of 70000 is made in the Earned Income Gross field instead of 7000. This type of entry indicates to the system that the client’s income is \$700.00 instead of \$70.00. While a budget will be displayed on the MA Budget screen and the budget calculation generated, the budget will not be correct. Again, it is the worker’s responsibility to review all entries for accuracy. Further, both system errors and keystroke errors must be corrected in order to calculate an accurate budget.

Additional System Error: when attempting to store a budget without having performed a new Budget calculation, the action will not be allowed. The following error message will appear at the bottom of the screen:

“MUST RECALCULATE BUDGET PRIOR TO STORING”

This message may be removed by recalculating the budget, proceeding to take another action other than storage or by signing off.

Earned Income Disregard Error: will occur if the Authorization period exceeds 9 months on MABEL. The message displayed on the budget screen will read as follows:

“BUDGET STORE NOT ALLOWED – CHANGE EFF. TO DATE.”

ERRORS AND ERROR CORRECTION

ERROR CORRECTION

When an error occurs, there are **two** ways to correct or change the information entered:

1. **Keying Over** – or typing over an incorrect number or character. For example; If an incorrect period code “1” was entered instead of “6” (monthly), the worker can move the cursor to the beginning of the field and type in “6”. This will replace the incorrect entry.
2. **Erase Field** – depress the Tab Key to move the cursor to the first field in error. Depressing either the Erase Field or Erase to EOL Key will remove all incorrect information from this field. Continued depressing of the Tab Key will move the cursor sequence to each blinking field. If changes are necessary in other than blinking fields, the Arrow Keys, Spacebar or Return Key must be used.

Blinking Asterisk fields, which are no longer in error, must be erased before re-transmission. This can be done using either the EOD Erase EOL Key, the CHARACTER ERASE Key or Display Erase to EOF Key.

When all errors have been corrected, bring the cursor to XMT. The field(s) will remain blinking until the XMT Key is depressed for the calculation.

ERRORS AND ERROR CORRECTION

FREQUENT ERRORS

Listed below are situations, which may result in an error upon transmission of the Budget Record Screen.

- Entry of number greater than 07 in the BT (Budget Type) field or the entry of information incompatible with the BT entered.
- Failure to enter Fuel Type, Shelter Type and Amount for BT's 01 and 02.
- Omitting entries in the DEEM (Deeming Code) and LA (Living Arrangement) fields for BT 04.
- Making an entry in the NO-DEEM (Number to Deem) field when the Deeming Code is 1 (to Spouse) or 4 (No Deeming).
- Failure to make an entry in the NO-DEEM field when the Deeming Code is 2 (To Child) or 3 (To Spouse and Child).
- If gross earned income is entered for BT's 01, 02 or 04, the following fields must be left blank: FICA, TX (Taxable Income Source), MS (Marital Status), EXM (Tax Exemptions) and NY-DIS (NYS Disability).
- If unearned income information is entered, failure to complete the following fields SR (Unearned Income Source), P (Period), and AMOUNT
- If the CD is 11 (One-Third SSI Child Support) making an entry in the Exempt field.

CASE EXAMPLES

CASE EXAMPLE

The following section contains case examples, which illustrate the use of the MABEL Budgeting screens. The examples illustrated in this section are for most frequently utilized budget types. For each Budget Type we have provided the following:

- A Case Description
- The MA Budget Record Screen for the Case
- An Explanation of the Information Entered on the MA Budget Record Screen
- The Budget Summary Screen(s) Returned
- An Explanation of the Fields Displayed on the Budget Summary Screen(s).

BUDGET TYPE 01 LIF/ADC-RELATED
 EXPANDED ELIGIBILITY BUDGETING

Mr. & Mrs. Jones applied for Medicaid in January of 2006. Mrs. Jones is pregnant and is expecting a child in July of 2006. The Jones have one minor child. Mr. Jones is employed full-time and earns \$300.00 weekly. Mrs. Jones is unemployed and collects unemployment insurance of \$75.00 weekly. The Jones pay a monthly rent of \$500.00. The Jones have no resources or savings.

The following information should be entered as follows, once entered, press Enter Key or XMIT to calculate the budget.

```

WBMAWB      PENDING MA BUDGET RECORD      VERSION 01      BUDGET TYPE 01
CASE NAME          CASE NO.  OFC UNIT  WRKR  TRAN  EFFECTIVE PER.  MO
MARGARET_JONES    020004221G  559  USREF  KEM09  02  010106 TO 093006
CA EEC EDC1      EDC2  AI  FUEL  TY  SHELTER:  TY  AMOUNT  WATER  AMOUNT  ADD:  TY  AMOUNT
03  B  071506      0          01  050000
-SSI-  DM  LA  NO-DM  NO-ALL  BUY  PASS  -CHRONIC-  DATE  INS  PIA  CON  AMOUNT  LOC
EARN  A  LN  CTG  N  I  EID  SRC  PER  T  GROSS  INSUR  CT-SUP  WK-REL  IRWE
INC 1  02  6  01  3  F  0030000
CHILD  MOYR  AMOUNT  MOYR  AMOUNT  MOYR  AMOUNT
CARE
EARN  A  LN  CTG  N  I  EID  SRC  PER  T  GROSS  INSUR  CT-SUP  WK-REL  IRWE
INC 2
CHILD  MOYR  AMOUNT  MOYR  AMOUNT  MOYR  AMOUNT
CARE
U LN C N I SR P AMOUNT CD EXMPT CD EXMPT  LN C N I SR P AMOUNT CD EXMPT CD EXMPT
I 01  49 3 007500
N
C
RESCS LN CTG N I CD RES-VAL  LN CTG N I CD RES-VAL  LN CTG N I CD RES-VAL
XMT
    
```

FIELD

INFORMATION ENTERED

VERSION	System Generated. Blank unless budget for a case already exists.
BUDGET TYPE	01 LIF/ADC-Related
CASE NAME	Margaret Jones
CASE NO.	020004221G
OFC	559

BUDGET TYPE 01 LIF/ADC RELATED

<u>FIELD</u>	<u>INFORMATION ENTERED</u>
TRAN	02 - Case Opening
EFFECTIVE PER	010106 to 093006
CA	03 - Three person budgeting unit.
EEC	B - Calculate budget all categories.
EDC 1	071506 - Date child is expected.
FUEL TY	0 - Heat included in shelter cost.
SHELTER TY	01 - Rent
AMOUNT	50000 - \$500.00
<u>EARNED INCOME:</u>	
LINE	02 - Line number of the person with the income.
EID	06 - Earned Income Disregard Calculate LIF (Applicant only).
SRC	01 - Salary and wages.
PER	3 - Period for weekly amount.
T	F - Full time
GROSS	30000 - \$300.00 weekly gross income.
<u>UNEARNED INCOME:</u>	
LN	01 - Line number of person with unearned income.
SR	49 - Income is from unemployment insurance.
PER	3 - Period for weekly amount.
AMOUNT	7500 - \$75.00 Weekly income amount.

EXPANDED ELIGIBILITY BUDGETING SCREEN

The Jone's MA budget had a surplus. Expanded Eligibility was applied, and EEC code of "B" was entered on the Budget record screen. When an EEC code is used, MABEL calculates two budgets, a MA budget and an Expanded Eligibility/FHP budget.

An explanation of this screen follows:

WBGMA	PENDING	EXPANDED	ELIGIBILITY/FHP	VERSION 01	DISTRICT NYC	01/30/06
CASE NAME		CASE NO.	OFC	UNIT	WORKER BT	EFFECTIVE PERIOD
MARGARET JONES		020004221G	559	USREF	KEM09 01	010106 TO 093006
CA: 03		EEC: B			TOTAL NET INCOME:	121325
TOTAL FHP RES:		EXC FHP RES:			TOTAL FHP INCOME:	130325
					TOTAL FP INCOME:	121325
PREGNANT WOMAN:		ELIGIBLE			100%	166300
INFANT:		ELIGIBLE			100%	166300
CHILD 1-5 YEARS:		ELIGIBLE			133%	221200
CHILD 6+ < 19:		ELIGIBLE			100%	166300
FHP: FAMILY		ELIGIBLE			150%	249400/1845000
FAMILY PLANNING:		ELIGIBLE			200%	332500

To store EEC Budget, Press Ctrl & Shift and F-3

BUDGET TYPE 01 LIF/ADC-RELATED/EXPANDED ELIGIBILITY

<u>FIELD</u>	<u>EXPLANATION</u>
VERSION	System Generated, budget transmitted to database.
DISTRICT	NYC - System Generated
DATE	01/30/06 - System Generated date budget was entered into system.
CASE NO.	020004221G
OFC	559
BT	01 - LIF/ADC-Related
EFFECTIVE PERIOD	010106 to 093006
CA	03 - Three persons on case.
EEC	B - Indicates expanded eligibility is being calculated for all categories.
TOTAL NET INC	121325 - \$1,213.25 Monthly net income.
TOTAL FHP INCOME	130325 - \$1,303.25.
TOTAL FP INCOME	121325 - \$1,213.25
PREGNANT WOMAN	166300 - \$1,663.00 Indicates Mrs. Jones is eligible at the 100% poverty level.
INFANT	166300 - \$1,663.00 Indicates the infant on the case is EEC eligible at the 100% poverty level.
CHIL 1-5 YEARS OLD	221200 - \$2,212.00 Indicates child on case is eligible at the 133% poverty level.
CHILD 6+ < 19 YEARS OLD	166300 - \$1,663.00 Indicates the child on the case is eligible at 100% of poverty level.
FHP: FAMILY	249400 - \$1,845.00 Indicates Mr. Jones is eligible at 150% of federal poverty level.
FAMILY PLANNING	332500 - \$3,325.00 Eligible at 200%

BUDGET TYPE 01 LIF/ADC-RELATED

<u>FIELD</u>	<u>EXPLANATION</u>
VERSION #	System Generated
DISTRICT	NYC-System Generated ENTRY
DATE	01/30/06-System Generated (date budget is entered into the system).
CASE NAME	Margaret Jones
CASE NO.	020004221G
OFC	559
TRAN	02
BT	01 - LIF/ADC-Related
CA	03 - Three person case
<u>NEEDS</u>	
PRE ADD	23800 - \$238.00 The PA standard of need for a three person case.
ENERGY	5300 - \$53.00 Combined Home Energy Allowance/ Supplemental Home Energy Allowance for a three person case.
SHELT	01 indicates rent. 50000 - \$500.00 is the Actual rent paid. 28600 - \$286.00 is the maximum Allowance for a three person case.
PA STD	57700 -\$577.00 indicates the sum of the needs amount in the allowance column.
MA LEVEL	102500 - \$1025.00 MA Net Income Exemption Level for a three person case.
<u>EARNED INCOME</u>	
LN	02 - System Generated as line number of person with income.
SR	01 - Source code of earned income: Salary/Wages.
PER	3 - Period code for weekly earned income.
T	F - Full time code.
EID	6 - Earned income disregard.

BUDGET TYPE 01 LIF/ADC-RELATED

<u>FIELD</u>	<u>EXPLANATION</u>
<u>EARNED INCOME</u>	
GROSS INC	130000 -\$1300.00 Monthly Gross Income Amount.
9000 - \$90.00	Work Related Expense (WRE). One \$90.00 disregard is allowed for each employed H/H member.
EID	0 - Earned Income Disregard.
CHILD CR	0 - Child Care
INSURANCE	0 - INSURANCE
TOT DED	\$90.00 Total monthly deductions.
TOTAL NET EARNED	121000 - \$1210.00 Monthly Net Income.
<u>UNEARNED INCOME</u>	
LN	02 - Line number of person with income
SR	49 Unearned Income Source code: Unemployment Insurance Benefits.
P	3 - The period for which interest is paid.
AMOUNT	32500 - \$325.00 the amount of UIB.
TOTAL NET UNEARNED	32500 - \$325.00 Weekly Net unearned income.
<u>MA SUMMARY</u>	
TOT NET INC	121325 - \$1213.25 Total net monthly income.
CD/MONTHLY INCOME	X - 18825 - \$188.25 indicate excess income amount.
EFFECTIVE PERIOD	010106 to 093006 Period of MA eligibility.

Note: FOR BUDGETS WITH SPANNING DATES IN WHICH MA LEVELS, TAX TABLE AMOUNTS AND ALLOWANCE CHANGES OCCUR, SUCH BUDGETS WILL BE BASED ON THOSE FIGURES IN EFFECT ON THE EFFECTIVE "FROM" DATE OF THE CALCULATED BUDGETS.

BUDGET TYPE 02 SINGLE CHILDLESS COUPLE S/CC RELTATED

FIELD

INFORMATION ENTERED

TRAN	02 - Case Opening
EFFECTIVE PER	040106 to 033107
CA	02 - Two person budgeting unit.
EEC	S - FHP S/CC - 100%
FUEL TY	0 - Heat included in shelter cost.
SHELTER TY	01 - Rent
AMOUNT	077500 - \$775.00

EARNED INCOME:

LINE	01 - Line number of the person with the income.
SRC	01 - Salary and wages.
PER	3 - Period for weekly amount.
T	F - Full time
GROSS	0060000 - \$600.00 weekly gross income.

UNEARNED INCOME:

LN	02 - Line number of person with unearned income.
SR	49 - Income is from Unemployment Insurance Benefits.
PER	3 - Period for weekly amount.
AMOUNT	012500 - \$125.00 Weekly income amount.

**BUDGET TYPE 02 SINGLE CHILDLESS COUPLE S/CC RELATED
 EXPANDED ELIGIBILITY SCREEN**

Because an EEC of "S" was entered, MABEL will only determine financial eligibility for FHP and Family Planning. The case is ineligible for FHP, their TOTAL FHP INCOME of \$3141.67, is above 100% of the FPL. Their TOTAL FP INCOME of \$3051.67 makes them ineligible for Family Planning Benefit Program.

WBG	TMA	PENDING	EXPANDED ELIGIBILITY/FHP	VERSION	DISTRICT NYC	03/06/06
CASE NAME	CASE NO.	OFC	UNIT	WORKER	BT	EFFECTIVE PERIOD
JONES KEEPUP	020004939D	559		SBH01	02	040106 TO 033107
CA: 02	EEC: S			TOTAL NET INCOME:		314167
TOTAL FHP RES:	EXC FHP RES:			TOTAL FHP INCOME:		314167
				TOTAL FP INCOME:		305167
PREGNANT WOMAN:						
INFANT:						
CHILD 1-5 YEARS:						
CHILD 6+ < 19:						
FHP: S/CC	INELIGIBLE INCOME			100%		110000/1620000
FAMILY PLANNING:	INELIGIBLE			200%		220000

The following is an explanation of this screen.

*BUDGET TYPE 02 SINGLE CHILDLESS COUPLE S/CC RELATED
EXPANDED ELIGIBILITY*

<u>FIELD</u>	<u>EXPLANATION</u>
VERSION	System Generated, budget transmitted to database.
DISTRICT	NYC - System Generated
DATE	03/06/06 - System Generated date budget was entered into system.
CASE NO.	020004939D
OFC	559
BT	02 S/CC - Related
EFFECTIVE PERIOD	040106 to 033107
CA	02 - Two person case.
EEC	S - FHP S/CC - 100%
TOTAL NET INC	314167 - \$3,141.67 Monthly Net Income.
TOTAL FHP INCOME	314167 - \$3,141.67
TOTAL FP INCOME	305167 - \$3,051.67
FHP: S/CC	110000 - \$1,6200.00 Indicates Mr. Jones is ineligible at 100% of federal poverty level.
FAMILY PLANNING	220000 - \$2,200.00 indicates Mr. Jones is ineligible at 200%.

**BUDGET TYPE 02 SINGLE CHILDLESS COUPLE S/CC RELATED
 BUDGET SUMMARY SCREEN**

<u>FIELD</u>	<u>EXPLANATION</u>
VERSION #	System Generated
DISTRICT	NYC - SYSTEM GENERATED ENTRY
DATE	03/06/06 - System Generated (date budget is entered into the system).
CASE NAME	Jones Keepup
CASE NO.	020004939D
OFC	559
TRAN	02 - Case Opening
BT	02 - Single Childless Couple S/CC - Related
CA	02 - Two person case
<u>NEEDS</u>	
PRE ADD	17900 - \$179.00 The PA standard of need for a two person case.
ENERGY	3950 - \$39.50 Combined Home Energy Allowance/ Supplemental Home Energy Allowance for a two person case.
SHELT	01 indicates rent. 77500 - \$775.00 is the Actual rent paid. 25000 - \$250.00 is the maximum Allowance for a two person case.
ST STD	46850-\$468.50 * indicates the sum of the needs amounts in the allowance column is based on State standard.
MA LEVEL	0 - MA Net Income Exemption Level for a two person case
<u>EARNED INCOME</u>	
LN	01 - System Generated as line number of person with income
SR	01 - Source code of earned income: Salary/Wages.
PER	3 - Period code for weekly earned income.
T	F - Full time code.

**BUDGET TYPE 02 SINGLE CHILDLESS COUPLE S/CC RELATED
 BUDGET SUMMARY SCREEN**

<u>FIELD</u>	<u>EXPLANATION</u>
<u>EARNED INCOME</u>	
GROSS INC	260000 -\$2600.00 Monthly Gross Income Amount.
9000 - \$90.00	Work Related Expense (WRE). One \$90.00 disregard is allowed for each employed H/H member.
EID	Earned Income Disregard.
CHILD CR	Child Care
INSURANCE	0 - INSURANCE
TOT DED	0 -Total monthly deductions.
TOTAL NET EARNED	260000 - \$2600.00 Monthly Net Income.
<u>UNEARNED INCOME</u>	
LN	02 - Line number of person with income
SR	49 Unearned Income Source code: Unemployment Insurance Benefits.
P	3 - The frequency period for which benefits are received.
AMOUNT	54167 - \$541.67 Monthly unearned Income
TOTAL NET UNEARNED	54167 - \$541.67 Monthly Net unearned income.
<u>RESOURCES</u>	
LN	Line number of person with resources.
CD	Prohibited with EEC code
RES-VAL	Prohibited with EEC code
<u>MA SUMMARY</u>	
TOT NET INC	314167 - \$3141.67 Total net monthly income.
185% ST STD	86673 - \$866.73
EFFECTIVE PERIOD	Blank area in Effective Period indicates ineligibility.

BUDGET TYPE 04 SSI RELATED (OAA)

<u>FIELD</u>	<u>INFORMATION ENTERED</u>
VERSION	System Generated. Blank unless budget for a case already exists.
BUDGET TYPE	04 -SSI Related (OAA)
CASE NAME	Doe, Linda
CASE NO.	020004224A
OFC	559
TRAN	02 - Case Opening.
EFFECTIVE PER.	010106 to 123106
CA	01 - One person budgeting unit.
FUEL	0 - Heat included in shelter cost.
SHELTER: TY	01 - Rent
AMOUNT	30000 - \$300.00
DEEM	4 - No deeming.
LA	1 - Single person household.
<u>UNEARNED INCOME:</u>	
LN	01 - Line number of person receiving the income.
C	1 - Categorical Code indicating income possessed by SSI Related (Aged) Adult.
SR	44 - Source code for Social Security Retirement income.
P	6 - Period code for received monthly.
AMOUNT	035000 - \$350.00 Amount of Social Security income.
CD	21 - Unearned Income Exemption Code for Medicare.
EXMPT	08850 - \$88.50 unearned exemption amount.

BUDGET TYPE 04 SSI RELATED (OAA)

FIELD

INFORMATION ENTERED

UNEARNED INCOME:

LN	01 - Line number of person receiving the income.
C	1 - Categorical Code indicating income possessed by SSI-Related Adult (Aged).
SR	03 - Source code for Dividends interest from savings
P	8 - Received quarterly.
AMOUNT	000200 - \$2.00 Amount of this unearned income.
LN	01 - Line number of person receiving the income.
C	1 - Categorical Code indicating income possessed by SSI-Related Adult (Aged).
SR	39 - Retirement Benefits (Pensions)
P	6 - Income received monthly.
AMOUNT	037500 - \$375.00 amount Pension benefit.

RESOURCES:

LN	01 - Line number of person with the resource.
CTG	1 - Categorical Code indicating resource possessed by SSI-Related Adult (Aged).
CD	02 - Resource is savings account.
RES-VAL	0200000 - \$2,000.00 Amount of savings.
LN	01 - Line number of person with the resource.
CTG	1 - Categorical Code indicating resource possessed by SSI-Related Adult (Aged).
CD	45 - Resource is Burial Reserve Disregard for SSI-Related.
RES-VAL	0150000 - \$1,500.00 amount of burial fund.

BUDGET TYPE 04 SSI RELATED - (OAA)

<u>FIELD</u>	<u>EXPLANATION</u>
<u>UNEARNED INCOME:</u>	
LN	01 - Line number of person with the unearned income.
C	1 - Categorical Code indicating SSI-Related Adult in receipt of this income.6.0
SR	44 - Income is from Social Security Retirement benefits.
P	6 - Income received monthly.
AMOUNT	35000 - \$350.00 Amount of Social Security income.
CD	21 - Unearned Income Exemption code for Medicare.
EXMPT	8850 - \$88.50 amount of Medicare exemption.
LN	01 - Line number of person with Retirement Pension.
C	1 - Categorical Code indicating SSI-Related adult in receipt of income.
SR	39 - Unearned Income Source code is for retirement pension.
P	6 - Period code income is monthly.
AMOUNT	37500 - \$375.00 amount of pension.
LN	01 - Line number of person with unearned income.
C	1 - Categorical Code indicating SSI-Related Adult in receipt of this income.
SR	03 - Unearned Income Source code for Interest income.
P	8 - Income is quarterly.
AMOUNT	67 - \$.67 monthly income (1/3 of quarterly income).
<u>RESOURCES:</u>	
AMOUNT	200000 - \$2,000.00 Amount of savings account
<u>MA SUMMARY:</u>	
PA STD	35210 - \$352.10 The PA standard of need for SSI Related budgeting.
MA LEVEL	69200 - \$692.00 The MA level for one Person
TOT NET INC	61717 - \$617.17 Total net monthly income. The amount is preceded by a "U" which indicated \$20.00 SSI disregard was taken from earned income.
EFFECTIVE PER	010106 to 123106

07/17/2006

BUDGET TYPE 05 SSI RELATED AND LIF/ADC RELATED

Tom and Faith Tower and their minor children under 18 apply for MA on January 10, 2006. They pay \$300.00 per month rent. Faith is employed full time and receives \$200.00 bi-weekly income. Tom is in receipt of Social Security Disability, \$350 per month. Their children receive a Social Security Dependent benefit of \$195.00 per month. Tom pays a Medicare premium of \$88.50 per month.

WBMAWB PENDING MA BUDGET RECORD										VERSION 01				BUDGET TYPE 05								
CASE NAME		CASE NO.		OFC UNIT		WRKR TRAN		EFFECTIVE PER.		MO												
TOWER TOM		020004220I		559 USREF		KEM09 02		010106		TO 123106												
CA	EEC	EDC1	EDC2	AI	FUEL	TY	SHELTER:	TY	AMOUNT	WATER	AMOUNT	ADD:	TY	AMOUNT								
04						0		01	030000													
-SSI-	DM	LA	NO-DM	NO-ALL	BUY	PASS	-CHRONIC-	DATE	INS	PIA	CON	AMOUNT	LOC									
	1	2		2																		
EARN	A	LN	CTG	N	I	EID	SRC	PER	T	GROSS	INSUR	CT-SUP	WK-REL	IRWE								
INC 1		02	4			6	01	4	F	0020000												
CHILD			MOYR			AMOUNT				AMOUNT		MOYR	AMOUNT									
CARE																						
EARN	A	LN	CTG	N	I	EID	SRC	PER	T	GROSS	INSUR	CT-SUP	WK-REL	IRWE								
INC 2																						
CHILD			MOYR			AMOUNT				AMOUNT		MOYR	AMOUNT									
CARE																						
U	LN	C	N	I	SR	P	AMOUNT	CD	EXMPT	CD	EXMPT	LN	C	N	I	SR	P	AMOUNT	CD	EXMPT	CD	EXMPT
I	01	3			42	6	035000	21	08850			03	8	1		46	6	019500				
N	04	8	2		46	6	019500															
C																						
RESCS	LN	CTG	N	I	CD	RES-VAL	LN	CTG	N	I	CD	RES-VAL	LN	CTG	N	I	CD	RES-VAL				

YMT

BUDGET TYPE 05 SSI RELATED & LIF/ADC RELATED

FIELD	INFORMATION ENTERED
VERSION	System Generated. Blank if no budget for case exists.
BUDGET TYPE	05 - SSI Related & LIF/ADC Related.
CASE NAME	Tom Tower
CASE NO	020004220I
OFC	559
TRAN	02 - Case Opening
EFFECTIVE PER	010106 to 123106
CA	04 - Number of people in budget unit
FUEL: TY	0 - Heat is included in shelter cost
SHELTER:TY	01 - Rent
AMOUNT	030000 - \$300.00 Monthly Rent
DM	1 - Indicates deeming of income is to SSI/Related spouse.
LA	2 - Indicates there is a couple living in the household.
NO-ALL	2- Indicates the number of non-SSI-Related Children under 18 in the household.
<u>EARNED INCOME:</u>	
LN	02 - Line number of person receiving income.
CTG	4 - Indicates earned income is possessed by a Non SSI-Related Adult. (ADC Related).
EID	6 - Earned Income Disregard code (LIF/ADC Related).
SRC	01 - Earned Income Source code for Salary, Wages.
PER	4 - Period Code for bi-weekly Amount.
T	F - Time Code for Employed Full Time.
GROSS	002000 - \$200.00 Bi-weekly Gross.

BUDGET TYPE 05 SSI RELATED & LIF/ADC RELATED

FIELD

INFORMATION ENTERED

UNEARNED INCOME:

LN	01 - Enter the line number of person receiving income.
C	3 - This code indicates that the unearned income is possessed by an SSI-Related Adult - Disabled.
SR	42 - Social Security Disability benefits is the source of this income.
P	6 - Indicates unearned income is received monthly.
AMOUNT	035000 - \$350.00 Amount of the Social Security Disability Benefit.
CD	21 - Unearned Income Exemption Code Indicates Medicare premium exemption.
EXMPT	08850 - \$88.50 Amount of exempted Medicare premium.
LN	03 - Line number of person receiving income.
C	8 - This code indicates that the unearned income is possessed by a Non-SSI Related Child.
N	1 - This identifies the first child with income SSI - Related.
SR	46 - This code indicates that the unearned income source is from Social Security Dependent Benefits.
P	6 - This code indicates that the income is received monthly.
AMOUNT	019500 - \$195.00 the amount of the unearned income.
LN	04 - Line number of person receiving income.
C	8 - This code indicates that the unearned income is possessed by a Non SSI Related Child.
N	2 - This identifies the second child with income SSI - Related.
SR	46 - This code indicates that the unearned income source is from Social Security Dependent Benefits.
P	6 - This code indicates that the income is received monthly.
AMOUNT	019500 - \$195.00 the amount of the unearned income.

BUDGET TYPE 05 SSI RELATED & LIF/ADC RELATED - MA SSI BUDGET SUMMARY SCREEN

Budget type – 05 SSI-Related & LIF ADC Related – displays two budget summary screens, the MA SSI BUDGET AND MA BUDGET. The first screen returned, the MA SSI Budget follows:

WBG TMA PENDING MA SSI BUDGET VERSION 01 DISTRICT NYC											03/17/06						
CASE NAME			CASE NO.			OFC	UNIT	WRKR	TRN	BT	CA	DM	LA	NO-DM			
TOWER TOM			020004220I			559	USREF	KEM09	02	05	04	1	2				
-----UNEARNED INCOME-----							-----EARNED INCOME-----										
LN	C	N	I	SR	P	AMOUNT	CD	EXEMPT	CD	EXEMPT	LN	C	N	I	SRC	PER	
01	3			42	6	35000	21	8850		0	02	4			01	4	
03	8	1		46	6	19500		0		0							
04	8	2		46	6	19500		0		0							
						0		0		0							
						0		0		0							
						0		0		0							
						0		0		0							
-----RESOURCES-----											43333 GROSS INC					0	
LN	N	RES-AMT	DEM-AMT	EXCESS	*****MA SUMMARY*****							6500	65	EXM AMT	0		
		0	0	0	PA STD							0		COURT SUP	0		
		0	0	0	*MA LEVEL							0		BLND/WK-RL	0		
		0	0	0	TOT NET INC U							0		1/2 REM	0		
		0	0	0	CD/MONTHLY							0		INSURANCE	0		
		0	0	0	MA LEVEL CHILD							0		TOTAL DED	0		
		0	0	0								0		TOTAL NET	0		
-----ALLOCATION-----											0 AMT DEEMED					0	
NO OF CHILD		2		0		0		0		0		0		0		0	
NS CH INC		39000		0		0		0		0		0		0		0	
AFTER ALLOC		22133															
											EFFECTIVE PER 010106 TO 123106					STORED 03/17/06	

The following is an explanation of the budget summary screen based on our example.

<u>FIELD</u>	<u>EXPLANATION</u>
VERSION#	System Generated indicating budgets transmitted to Database.
DISTRICT	NYC - System Generated entry.
DATE	03/17/06 - System Generated today's date.
CASE NAME	Tower, Tom

BUDGET TYPE 05 SSI RELATED & LIF/ADC RELATED

<u>FIELD</u>	<u>EXPLANATION</u>
CASE NO.	020004220I
OFC	559
WRKR	KEM09
TRAN	02 - A Case opening.
BT	05 - SSI Related & LIF/ADC Related.
CA	04 - The number of people in the budget unit.
DM	1 - Deem to SSI Related spouse.
LA	2 - Indicates couple in household.
<u>UNEARNED INCOME:</u>	
LN	01 - Line number of person receiving income.
C	3 - This code indicates that the unearned income is received by an SSI/Related disabled Adult.
SR	42 - This code indicates that the unearned income's source is from Social Security Disability benefits.
P	6 - This code indicates the unearned income is received on a monthly basis.
AMOUNT	35000 - \$350.00 Actual amount of income received.
CD	21 - Indicates the exemption from this unearned income is Medicare.
EXMPT	8850 - \$88.50 The amount of the exemption.
LN	03 - Line number of person receiving income.
C	8 - Indicates the unearned income is possessed by non-SSI Related Child.
N	1 - This code identifies the 1st child whose income was recorded.
SR	46 - Identifies the source of the unearned income as Social Security Dependent's benefits.
P	6 - This code indicates that the income is received monthly.
AMOUNT	19500 - \$195.00 The amount of the monthly income.

BUDGET TYPE 05 SSI RELATED & LIF/ADC RELATED

<u>FIELD</u>	<u>EXPLANATION</u>
<u>UNEARNED INCOME:</u>	
LN	04 - Line number of person receiving income.
C	8 - Indicates the unearned income is possessed by non-SSI Related Child.
N	2 - This code identifies the 2nd child whose income was recorded.
SR	46 - Identifies the source of the unearned income as Social Security Dependent's benefits.
P	6 - This code indicates that the income is received monthly.
AMOUNT	19500 - \$195.00 The amount of the monthly income.
<u>EARNED INCOME:</u>	
LN	02 - Line number: number of person receiving income
C	4 - Indicates the person in receipt of the earned income is a Non SSI Related Adult.
SRC	01 - Indicates Income source is from salary/wages.
PER	4 - Indicates the income is received on bi-weekly basis.
GROSS INC	43333 - \$433.33 Amount of Gross income for period code.
EXM AMT/65	6500 - \$65.00 This figure is the amount of the \$65 (or actual monthly work related expenses).
<u>ALLOCATION:</u>	
NO OF CHILD	2 - The number of child(ren) to whom allocation is made.
NS CH INC	19500 - \$195.00 The total amount of the Non-SSI Related child's income.
AFTER ALLOC	2633 - \$26.33 The amount of the Non-SSI Related Adult's income available after allocation.
<u>MA SUMMARY:</u>	
PA STD	35210 - \$352.10 The PA Standard of need for SSI related budgeting.
*MA LEVEL	69200 - \$692.00 The MA Level based on household size.
TOT NET INC U	43650 - \$436.50 The total monthly amount of the combined net earned and unearned income. "U" indicates that \$20 SSI disregard was taken from unearned income.
EFFECTIVE PER	010106 to 123106 The period this budget covers.

*F-8 Will move you to the MA Budget Screen for the ADC portion of the budget.

07/17/2006

BUDGET TYPE 05 SSI RELATED & LIF/ADC RELATED - MA BUDGET SUMMARY SCREEN

The second summary screen returned for the ADC/Related members of the budgeting unit, the MA Budget Screen, follows:

WBGTMA		PENDING	MA BUDGET		VERSION 01	DISTRICT NYC			03/17/06				
CASE NAME				CASE NO.	OFC UNIT	WRKR	TRN	BT CA	EDC1	EDC2 AI			
TOWER TOM				020004220I	559 USREF	KEM09	02	05 04					
-----NEEDS-----						-----EARNED INCOME-----							
TY	ACTUAL	ALLOW	*****MA SUMMARY*****			LN	SRC	PER	T	EID			
	PRE ADD	30700	TOTAL NET INCOME			99483	02	01	4	F 6			
	ENERGY	6870	CD/MONTHLY			0							
01	SHELT	30000	30000										
	WATER	0	0	CD/EX RESOURCES			0	43333	GROSS INC 0				
	FUEL	0	0				0	9000	\$90.00 0				
	ALLOW/PREG	0	0					0	EID 0				
	PA STD	67570						0	CHILD CR 0				
*	MA LEVEL	102500						0	INSURANCE 0				
-----UNEARNED INCOME-----						--RESOURCES--							
LN	SR	P	AMOUNT	CD	EXEMPT	CD	EXEMPT	LN	CD	RES-VAL	9000	TOTAL DED	0
01	42	6	35000	21	8850		0			0	TOTAL NET EARNED		34333
03	46	6	19500		0		0			0			
04	46	6	19500		0		0			0			
			0		0		0			0			
			0		0		0			0			
			0		0		0			0			
			0		0		0			0			
					0		TOT RES			0			
TOTAL NET UNEARNED			65150	EFF PER 010106 TO 123106			DATE STORED						

BUDGET TYPE 05 SSI RELATED & LIF/ADC RELATED

The following is an explanation of the budget summary screen based on our example.

<u>FIELD:</u>	<u>EXPLANATION</u>
VERSION	System Generated indicating budgets transmitted to Database.
DISTRICT	NYC - System Generated entry.
DATE	03/17/06 - System Generated (date budget was calculated).
CASE NAME	Tower, Tom
Case NO	020004220I
OFC	559
WRKR	KEM09
TRAN	02 - Case Opening.
BT	05 - SSI Related & LIF/ADC Related.
CA	04 - Number of persons in the budget unit.
<u>NEEDS:</u>	
PRE ADD	\$30700 - \$307.00 The PA standard of need for a three person case.
ENERGY	6870 - \$68.70 Combined Home Energy Allowance/ Supplemental Home Energy Allowance for three people.
SHELT	01 - Indicates Rent 30000 - \$300.00: Actual rent paid
FUEL TY	0 - Indicates heat included in rent.
PA STD	67570 - \$675.70 Indicates the sum of the amounts in the allowance column.
MA LEVEL	The asterik () indicates this level is used in the MA Summary portion of the screen 102500 - \$1025.00 MA level for a four person case.

BUDGET TYPE 05 SSI RELATED & LIF/ADC RELATED

<u>FIELD</u>	<u>EXPLANATION</u>
<u>UNEARNED INCOME:</u>	
LN	01 - Line number of person receiving income.
SR	42 - Identifies the unearned income as from Social Security Disability benefits.
P	6 - This code indicates the income is received monthly.
AMOUNT	35000 - \$350.00 The amount of the monthly unearned income.
CD	21 - Indicates Medicare premium is exempted from Social Security income.
EXMPT	8850 - \$88.50 Amount of Medicare premium.
LN	03 - Line number: number of person receiving income.
SR	46 - Identifies the income as from Social Security Dependent's benefits.
P	6 - Indicates amount received monthly.
AMOUNT	19500 - \$195.00 The amount of social security income.
LN	04 - Line number of the person receiving income.
SR	46 - Unearned Income Source Code for Social Security Dependent Benefits.
TOTAL NET UNEARNED	65150 - \$651.50 Total unearned income available to ADC. household members.
<u>EARNED INCOME:</u>	
LN	02 - Line number of person receiving income.
SR	01 - Identifies income is from salary/wages.
P	4 - Indicates income is received on bi-weekly basis.
T	F - Indicates wage earner is employed full-time.
EID	6 - Earned Income Disregard for Applicant
GROSS INC	43333 - \$433.33 Monthly Gross Earned Income amount.
\$90.00	9000 - \$90.00 Standard disregard earned income
TOTAL DED	9000 - \$90.00 Total Monthly Deduction.
TOTAL NET EARNED	34333 - \$343.33 Monthly Net Earned Income amount.
<u>MA SUMMARY:</u>	
TOTAL NET INCOME	99483 - 994.83 earned and unearned income
EFFECTIVE PER	010106 To 123106 the period for which budget is effective.

BUDGET TYPE 06 SSI RELATED & S/CC RELATED

FIELD

INFORMATION ENTERED

VERSION System Generated. This screen is blank if no budget for case exists.

BUDGET TYPE 06 - SSI Related & S/CC Related

CASE NAME KIM BREWSTER

CASE NO. 020004219A

OFC 559

TRAN 02 - Case Opening

EFFECTIVE PER. 010106 to 123106

CA 02 - Number in budgeting unit

FUEL TY 0 - Heat is included in shelter cost

SHELTER TY 01 - Rent

AMOUNT 030000 - \$300.00 Monthly rent

DM 1 - Deeming to SSI-Related spouse

LA 2 - Couple living alone or with others.

EARNED INCOME:

LN 01 - Line number of person receiving income

CTG 5 - Indicates earned income is possessed by a Non SSI-Related Adult (S/CC).

SRC 09 - Earned Income Source code for Family Day Care Provider Provider.

PER 6 - Period Code for monthly amount.

T F - Time Code for Employed Full Time.

GROSS 002000 - \$200.00 Monthly Gross.

BUDGET TYPE 06 SSI RELATED & S/CC RELATED

FIELD

INFORMATION ENTERED

UNEARNED INCOME:

LN	02 - Line number of person receiving income
C	1 - Categorical code indicating that income is possessed by an SSI-Related Adult - Retired.
SR	44 - Source of income is Social Security Retirement benefits.
P	6 - Unearned income is received on a monthly basis.
AMOUNT	035000- \$350.00 The amount of the unearned income.

BUDGET TYPE 06 SSI RELATED & S/CC RELATED

The following is an explanation of the budget summary screen based on our example.

<u>FIELD</u>	<u>EXPLANATION</u>
VERSION	System Generated indicating budgets transmitted to Database.
DISTRICT	NYC - System Generated entry.
DATE	04/11/06 - System Generated as a date the budget was entered into system.
CASE NAME	KIM, Brewster
CASE NO.	020004219A
OFC	559
TRAN	02 - Case Opening.
BT	06 SSI-Related S/CC Related.
CA	02 - Persons on case.
DM	1 - Deeming to SSI-Related spouse.
LA	2 - Couple living alone or with others.
<u>UNEARNED INCOME:</u>	
LN	02 - Line number of person receiving income.
C	1 - Categorical code indicating unearned income is possessed by SSI Related Adult - Retired.
SR	44 - Source of income is Social Security Retirement benefits.
P	6 - Indicates income is monthly.
AMOUNT	035000 - \$350.00 The amount of unearned income.
<u>EARNED INCOME:</u>	
LN	01 - Line of person receiving income.
C	5 - Indicates the person in receipt of the earned income is a Non SSI Related Adult (S/CC).
SRC	09 - Indicates Income source is from Family Day Care Provider Income.
PER	6 - Indicates the income is received on a monthly basis.
GROSS INC	20000 - \$200.00 Amount of Gross income for period code.
EXM AMT/65	6500 - \$65.00 This figure displayed is the amount of the \$65 (or actual monthly work related expenses).

BUDGET TYPE 06 SSI RELATED & S/CC RELATED

<u>FIELD</u>	<u>EXPLANATION</u>
<u>UNEARNED INCOME:</u>	
LN	02 - Line number of person receiving income.
C	1 - Categorical code indicating that unearned income is received by SSI-Related Adult - Aged.
SR	44 - Source of income is Social Security Retirement Benefit.
P	6 - Unearned income is received on a monthly basis.
AMOUNT	35000 - \$350.00 The amount of income received.
LN	01 - Line number of person receiving income.
C	5 - Categorical code indicating that Earned income is received by Non-SSI-Related Adult - (S/CC).
SR	09 - Source of income is from Family Day Care Provider Income.
P	6 - Unearned income is received on a monthly basis.
AMOUNT	20000 - \$200.00 The amount of income received.
<u>ALLOCATION:</u>	
AFTER ALLOC	20000 - \$200.00 The amount of the non-SSI related spouse/parent's income available after allocation.
<u>MA SUMMARY:</u>	
PA STD	35210 - \$352.10 The PA standard for SSI budgeting.
*MA LEVEL	69200 - \$692.00 The MA level for a family of 2.
TOT NET INC U	33000 - 330.00 The amount of income considered available to the SSI Related spouse. The letter "U" preceding the amount indicates that the \$20.00 SSI disregard was taken from unearned income.
CD/MONTHLY	0 - The amount of the monthly excess which must be spent down in order for the SSI related spouse to be eligible.
EFFECTIVE PER	010106 to 123106 The period for which this budget is in effect.

BUDGET TYPE 06 SSI RELATED & S/CC RELATED

FIELD

EXPLANATION

NEEDS:

PRE ADD	17900 - \$179.00 The PA standard of need for 2 people.
ENERGY	3950 - \$39.50 Combined Home Energy Allowance/ Supplemental Energy Allowance for 2 people.
SHELTER	01 - Indicates Rent: 30000 - \$300.00 Actual Rent Paid 25000 - \$250.00 Allowable Rent.
ST STD	46850 - \$468.50 PA Standard for this household.

UNEARNED INCOME:

LN	02 - Line number of person receiving the income.
SR	44 - Source of income is Social Security Retirement benefits.
P	6 - Indicates income is monthly.
AMOUNT	35000 - \$350.00 Amount of the unearned income.
LN	02 Line number of person receiving the income.

EARNED INCOME:

LN	01 - Line number of person receiving income.
SR	09 - Identifies income as from Family Day Care Provider.
P	6 - Indicates income is received on monthly basis.
T	F - Indicates wage earner is employed full-time.
GROSS INC	20000 - \$200.00 Monthly Gross Earned Income amount.
\$90.00	9000 - \$90.00 Standard disregard earned income.
TOTAL DED	9000 - \$90.00 Total Monthly Deduction.
TOTAL NET EARNED	11000 - \$110.00 Monthly Net Earned Income amount.

MA SUMMARY:

TOT NET INC	46000 - \$460.00 The total applicable income.
EFFECTIVE PER	010106 - 12/31/06 The period in which the budget is effective.

BUDGET TYPE 04 - SSI RELATED MEDICARE SAVINGS PROGRAM

<u>FIELD</u>	<u>INFORMATION ENTERED</u>
VERSION	System Generated. This screen is blank if no budget for case exists.
BUDGET TYPE	04 - SSI Related - Medicare Savings Program
CASE NAME	JANE GOMEZ
CASE NO.	020004356A
OFC	559
TRAN	02 - Case Opening
EFFECTIVE PER.	010106 to 123106
CA	01 - Number in budgeting unit
FUEL TY	0 - Heat is included in shelter cost
SHELTER TY	01 - Rent
AMOUNT	030000 - \$300.00 Monthly rent
DM	4 - No Deeming
LA	1 - Single Person.
BUY	A - QMB - Qualified Medicare Beneficiary

UNEARNED INCOME:

LN	01 - Line number of person receiving income
C	1 - SSI - Related Adult - Aged
SR	44 - Source of income is Social Security Retirement benefits.
P	6 - Unearned income is received on a monthly basis.
AMOUNT	034500- \$345.00 The amount of the unearned income.
LN	01 - Line number of person receiving income.
C	1 - SSI - Related Adult - Aged.
SR	39 - Retirement Benefits (pension).
P	6 - Unearned income is received on a monthly basis.
AMOUNT	030000- \$300.00 The amount of the unearned income.
LN	01 - Line number of person receiving income.
C	1 - SSI - Related Adult -Aged.
SR	03 - Interest from savings account.
P	8 - Unearned income is received on a quarterly basis.
AMOUNT	01500- \$15.00 The amount of the unearned income.

BUDGET TYPE 04 - SSI RELATED MEDICARE SAVINGS PROGRAM

FIELD

INFORMATION ENTERED

RESOURCES:

LN	01 - Line number of person with the resource.
CTG	1 - Categorical Code indicating resource possessed by SSI-Related Adult (Aged).
CD	02 - Resource is savings account.
RES-VAL	0400000 - \$4,000.00 Amount of savings.
LN	01 - Line number of person with the resource.
CTG	1 - Categorical Code indicating resource possessed by SSI Related Adult (Aged).
CD	45 - Resource is Burial Reserve Disregard for SSI-Related.
RES-VAL	0150000 - \$1,500.00 amount of burial fund.

07/17/2006

BUDGET TYPE 04 - SSI RELATED BUDGET SUMMARY SCREEN

The output screen message Buy In Eligible. May be enrolled in the Medicare Savings Program.

WBG TMA PENDING MA SSI BUDGET VERSION 01 DISTRICT NYC										03/07/06							
CASE NAME				CASE NO.		OFC	UNIT	WRKR	TRN	BT	CA	DM	LA	NO-DM			
JANE GOMEZ				020004356A		559	USREF	KEM09	02	04	01	4	1				
-----UNEARNED INCOME-----										-----EARNED INCOME-----							
LN	C	N	I	SR	P	AMOUNT	CD	EXEMPT	CD	EXEMPT	LN	C	N	I	SRC	PER	
01	1			44	6	34500		0		0							
01	1			39	6	30000		0		0							
01	1			03	8	500		0		0							
						0		0		0							
						0		0		0							
						0		0		0							
						0		0		0							
-----RESOURCES-----										0 GROSS INC							
LN	N	RES-AMT	DEM-AMT	EXCESS	*****MA SUMMARY*****							0 65 EXM AMT					
		400000	0	0	PA STD		35210		0 COURT SUP		0						
		0	0	0	*MA LEVEL		69200		0 BLND/WK-RL		0						
		0	0	0	TOT NET INC U		63000		0 1/2 REM		0						
		0	0	0	CD/MONTHLY		0		0 INSURANCE		0						
		0	0	0	MA LEVEL CHILD		0		0 AMT DEEMED		0						
		0	0	0	N TOT NET CD/MON AMT		0		0 TOTAL DED		0						
-----ALLOCATION-----										0 TOTAL NET							
NO OF CHILD				0		0		0		0							
NS CH INC				0		0		0		0							
AFTER ALLOC				0		EFFECTIVE PER 010106 TO 123106		STORED 03/07/06									

BUDGET TYPE 04 - SSI RELATED MEDICARE SAVINGS PROGRAM

<u>FIELD</u>	<u>EXPLANATION</u>
VERSION	System Generated indicating budgets transmitted to Database.
DISTRICT	NYC - System Generated entry.
DATE	03/07/06 - System Generated as a date the budget was entered into system.
CASE NAME	JANE, GOMEZ
CASE NO.	020004356A
OFC	559
TRAN	02 - Case Opening.
BT	04 SSI-Related.
CA	01 - Persons on case.
DM	4 - No Deeming.
LA	1 - Single Person.

UNEARNED INCOME:

LN	01 - Line number of person receiving income.
C	1 - SSI-Related Adult - Aged.
SR	44 - Source of income is Social Security Retirement benefits.
P	6 - Indicates income is monthly.
AMOUNT	034500 - \$345.00 The amount of unearned income.

RESOURCES:

AMOUNT	400000 - \$4,000.00 Amount of savings account
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MA SUMMARY:

PA STD	35210 - \$352.10 The PA standard of need for SSI Related budgeting.
MA LEVEL	69200 - \$692.00 The MA level for one Person
TOT NET INC	63000 - \$630.00 Total net monthly income. The amount is preceded by a "U" which indicated \$20.00 SSI disregard was taken from earned income.
EFFECTIVE PER	010106 to 123106

07/17/2006

BUDGET TYPE 07 CHRONIC CARE INDIVIDUAL

Busta Rooks is an 80 year old man who was admitted to a nursing home on February 12, 2006. Mr. Rooks placement was considered permanent as of the date of admittance. Mr. Rooks makes an application for Medical Assistance on February 18, 2006. Mr. Rooks receives a monthly Social Security benefit of \$700.00 monthly. He has a bank account of \$1,200.00, which earns \$1.25 a month in interest. He also has a \$1,500.00 Burial Fund.

WBMAWB PENDING MA BUDGET RECORD										VERSION 01		BUDGET TYPE 07										
CASE NAME				CASE NO.		OFC	UNIT	WRKR	TRAN	EFFECTIVE PER.		MO										
ROOKS_BUSTA				020006233J		599	USREF	KEM09	02	020106 TO 123106												
CA	EEC	EDC1	EDC2	AI	FUEL	TY	SHELTER:	TY	AMOUNT	WATER	AMOUNT	ADD: TY	AMOUNT									
01																						
-SSI-	DM	LA	NO-DM	NO-ALL	BUY	PASS	-CHRONIC-	DATE	INS	PIA	CON	AMOUNT	LOC									
	4	1						021206		2												
EARN	A	LN	CTG	N	I	EID	SRC	PER	T	GROSS	INSUR	CT-SUP	WK-REL	IRWE								
INC 1																						
CHILD			MOYR			AMOUNT				MOYR		AMOUNT										
CARE																						
EARN	A	LN	CTG	N	I	EID	SRC	PER	T	GROSS	INSUR	CT-SUP	WK-REL	IRWE								
INC 2																						
CHILD			MOYR			AMOUNT				MOYR		AMOUNT										
CARE																						
U	LN	C	N	I	SR	P	AMOUNT	CD	EXMPT	CD	EXMPT	LN	C	N	I	SR	P	AMOUNT	CD	EXMPT	CD	EXMPT
I	01	1		X	44	6	070000					01	1		X	03	6	000125				
N																						
C																						
RESCS	LN	CTG	N	I	CD	RES-VAL	LN	CTG	N	I	CD	RES-VAL	LN	CTG	N	I	CD	RES-VAL				
	01	1		X	02	0120000	01	1		X	45	0150000										
																						XMT

BUDGET TYPE 07 CHRONIC CARE INDIVIDUAL

<u>FIELD</u>	<u>INFORMATION ENTERED</u>
VERSION	System Generated. This screen is blank if no budget for case exists.
BUDGET TYPE	07 - Chronic Care Individual
CASE NAME	BUSTA ROOKS
CASE NO.	020006233J
OFC	559
TRAN	02 - Case Opening
EFFECTIVE PER	020106 to 123106
CA	01 - Number in budgeting unit
DM	4 - No Deeming
LA	1 - Single Person.
DATE INS	021206 - Date Institutionalized - indicates the date the person was admitted to the Nursing Home.
PIA	2 - Personal Incidental Allowance for resident in Chronic Care facility.
<u>UNEARNED INCOME:</u>	
LN	01 - Line number of person receiving income.
C	1 - SSI - Related Adult - Aged
I	X - Chronic Care Indicator - Chronic Care person on case with income and/or resources recorded in budget.
SR	44 - Source of income is Social Security Retirement benefits.
P	6 - Unearned income is received on a monthly basis.
AMOUNT	070000- \$700.00 The amount of the unearned income.
LN	01 - Line number of person receiving income.
C	1 - SSI - Related Adult -Aged.
I	X - Chronic Care Indicator - Chronic Care person on case with income and/ or resources recorded in budget.
SR	03 - Interest from savings account.
P	6 - Unearned income is received on a monthly basis.
AMOUNT	00125 - \$1.25 The amount of the unearned income.

BUDGET TYPE 07 CHRONIC CARE INDIVIDUAL

RESOURCES:

LN	01 - Line number of person with the resource.
CTG	1 - Categorical Code indicating resource possessed by SSI-Related Adult (Aged).
I	X - Chronic Care Indicator - person on case with income and/or resources recorded in budget.
CD	02 - Resource is savings account.
RES-VAL	0120000 - \$1,200.00 Amount of savings.
LN	01 - Line number of person with the resource.
CTG	1 - Categorical Code indicating resource possessed by SSI-Related Adult (Aged).
I	X - Chronic Care Indicator - person on case with income and/or resources recorded in budget.
CD	45 - Resource code is for Burial Fund.
RES-VAL	0150000 - \$1,500.00 Amount of burial fund.

BUDGET TYPE 07 CHRONIC CARE INDIVIDUAL

<u>FIELD</u>	<u>EXPLANATION</u>
VERSION	System Generated indicating budgets transmitted to Database.
DISTRICT	NYC - System Generated entry.
DATE	03/23/06 - System Generated as a date the budget was entered into system.
CASE NAME	BUSTA ROOKS
CASE NO.	020006233J
OFC	559
TRAN	02 - Case Opening.
BT	07 - Chronic Care.
CA	01 - Persons on case.

UNEARNED INCOME:

LN	01 - Line number of person receiving income.
C	1 - SSI - Related Adult - Aged
I	X - Chronic Care Indicator - Chronic Care person on case with income and/or resources recorded in budget.
SR	44 - Source of income is Social Security Retirement benefits.
P	6 - Unearned income is received on a monthly basis.
AMOUNT	070000- \$700.00 The amount of the unearned income.
LN	01 - Line number of person receiving income.
C	1 - SSI - Related Adult -Aged.
I	X - Chronic Care Indicator - Chronic Care person on case with income and/ or resources recorded in budget.
SR	03 - Interest from savings account.
P	6 - Unearned income is received on a monthly basis.
AMOUNT	00125 - \$1.25 The amount of the unearned income.

MA SUMMARY:

TOT NET	U - 68125 - 70125
MA LEVEL/PIA	69200 - 5000 The MA level for one Person.
CONTRIB TO COST	65125
TOTAL TO COST	65125
EFFECTIVE PER MONTH OF INST	020106 to 022806-Indicates the budget for the month, in which the individual left the community and was institutionalized.
CHRONIC CARE	030106 to 123106-Indicates the budget for the period of Institutionalization.

BUDGET TYPE 07 CHRONIC CARE INDIVIDUAL

<u>FIELD</u>	<u>INFORMATION ENTERED</u>
VERSION	System Generated. This screen is blank if no budget for case exists.
BUDGET TYPE	07 - Chronic Care Individual
CASE NAME	TIMMONS CARLEY
CASE NO.	020006234H
OFC	559
TRAN	02 - Case Opening
EFFECTIVE PER	030106 to 013107
CA	01 - Number in budgeting unit
DM	4 - No Deeming
LA	1 - Single Person.
DATE INS	030606 - Date Institutionalized - indicates the date the person was admitted to the Nursing Home.
PIA	2 - Resident of other chronic care facilities.
<u>UNEARNED INCOME:</u>	
LN	01 - Line number of person receiving income.
C	1 - SSI - Related Adult - Aged
I	X - Chronic Care Indicator - Chronic Care person on case with income and/or resources recorded in budget.
SR	44 - Source of income is Social Security Retirement benefits.
P	6 - Unearned income is received on a monthly basis.
AMOUNT	036500- \$365.00 The amount of the unearned income.
LN	01 - Line number of person receiving income.
C	1 - SSI - Related Adult -Aged.
I	X - Chronic Care Indicator - Chronic Care person on case with income and/ or resources recorded in budget.
SR	03 - Interest from savings account.
P	6 - Unearned income is received on a monthly basis.
AMOUNT	00150 - \$1.50 The amount of the unearned income.
<u>RESOURCES:</u>	
LN	01 - Line number of person with the resource.
CTG	1 - Categorical Code indicating resource possessed by SSI Related Adult (Aged).
I	X - Chronic Care Indicator - person on case with income and/ or resources recorded in budget.
CD	02 - Resource is savings account.
RES-VAL	0150000 - \$1,500.00 Amount of savings.

BUDGET TYPE 07 CHRONIC CARE INDIVIDUAL

<u>FIELD</u>	<u>EXPLANATION</u>
VERSION	System Generated indicating budgets transmitted to Database.
DISTRICT	NYC - System Generated entry.
DATE	03/24/06 - System Generated as a date the budget was entered into system.
CASE NAME	TIMMONS CARLY
CASE NO.	020006234H
OFC	559
TRAN	02 - Case Opening.
BT	07 - Chronic Care.
CA	01 - Persons on case.

UNEARNED INCOME:

LN	01 - Line number of person receiving income.
C	1 - SSI - Related Adult - Aged
I	X - Chronic Care Indicator - Chronic Care person on case with income and/or resources recorded in budget.
SR	44 - Source of income is Social Security Retirement benefits.
P	6 - Unearned income is received on a monthly basis.
AMOUNT	036500- \$365.00 The amount of the unearned income.
LN	01 - Line number of person receiving income.
C	1 - SSI - Related Adult -Aged.
I	X - Chronic Care Indicator - Chronic Care person on case with income and/ or resources recorded in budget.
SR	03 - Interest from savings account.
P	6 - Unearned income is received on a monthly basis.
AMOUNT	00150 - \$1.50 The amount of the unearned income.

MA SUMMARY:

TOT NET	36650 - Total Net before MA Level/PIA deduction.
MA LEVEL/PIA	69200 - \$5000 The MA level for one Person.
CONTRIB TO COST	31650
TOTAL TO COST	31650
EFFECTIVE PER MONTH OF INST	Blank - Institutionalized two months prior effective date. Entitled to chronic care budgeting.
CHRONIC CARE	040106 to 013107-Indicates the budget for the period of Institutionalization.

APPENDIX OF BUDGETING CODES

ADDITIONAL ALLOWANCE (ADD-TY)

- 01 Dinner
- 02 Lunch & Dinner
- 03 Breakfast, Lunch and Dinner
- 13 Home Delivered Meals
- 19 Additional Community Maintenance Allowance (use with budget types 08 - 10)
- 20 Transitional Child Care
- 21 Maintenance Allowance for Dependent Members of Institutionalized Individual's Former Household (BT 8,9 and 10)
- 22 Family Member Allowance (added to MMMNA) Budget Types 08-10)
- 25 Home Attendant Line Operating System (HALO)
- 26 Medical Bill Total/I.S.
- 99 Other (Occupational Child Care, TPHI)

BUDGET TYPE

- 01 LIF Related
- 02 S/CC Related
- 04 SSI Related/AB/AD/OAA
- 05 SSI Related/ADC/LIF Related
- 06 SSI Related/S/CC
- 07 Chronic Care Individual**
- 08 Chronic Care/SSI Related**
- 09 Chronic Care and LIF/ADC Related**
- 10 Chronic Care and S/CC**

Note: Budget Type 07, 08, 09 and 10 are for Nursing Home and Hospitals only.

CATERGORICAL IND CODES (CTG)- EARNED/UNEARNED INCOME

- 1 SSI Related Adult-Aged
- 2 SSI Related Adult-Blind
- 3 SSI Related Adult-Disabled
- 4 Non-SSI Related Adult-(LIF Related)
- 5 Non-SSI Related Adult-(S/CC Related)
- 6 SSI Related Child-Blind
- 7 SSI Related Child-Disabled
- 8 Non SSI Related Child

CATEGORICAL INDICATOR CODES (CTG) - RESOURCES

- 1 SSI Related Adult-Aged
- 2 SSI Related Adult-Blind
- 3 SSI Related Adult-Disabled
- 4 Non-SSI Related Adult-(LIF Related)
- 5 Non-SSI Related Adult-(S/CC Related)
- 6 SSI Related Child-Blind
- 7 SSI Related Child-Disabled
- 8 Non SSI Related Child

APPENDIX OF BUDGETING CODES

CHILD IDENTIFIER (N) - EARNED/UNEARNED INCOME OR RESOURCES

Enter the number that identifies children with income and/or resources. Number *consecutively* beginning with SSI-Related children.

SSI Related Child(ren) - Should be assigned identifiers 1 through 4.

LIF/ADC Related Child(ren) 1 - 9

LIF/ADC Related Child(ren) 5 - 9

CHRONIC CARE INDICATOR (I)

Chronic care person on case with income and/or resources recorded in budget.

X Income is received by person in Chronic Care

Blank indicates Income is not received by person in Chronic Care

PERSONAL INCIDENTAL ALLOWANCE CODES (PIA)

1 \$35.00 Residents ICF's

2 \$50.00 Residents of Other Chronic Care Facilities

3 \$250.00 Lombardi cases (waiver services)

4 Maximum \$90.00 Reduced Pension for Veterans in Nursing Facilities

SPOUSAL CONTRIBUTION CODES (CON)

1 Contributing the Amount Required by Regulation

2 Contributing More Than the Amount Required by Regulation

3 Contributing Less Than the Amount Required by Regulation Adjudicated

4 Contribution Less Than the Amount Required by Regulation-Not Adjudicated

5 Refuses to Contribute

EARNED INCOME SOURCE (SRC)

01 Salaries, Wages (Employer Provided Sick Pay)

05 Commission Income

06 Other Earnings

08 Severance Pay

09 Family Day Care Provider Income

11 Income-In-Kind Shelter

12 Lump Sum Payment

13 Lump Sum Payment Received by Current Wage Earner

20 Net Business Income

40 Earnings From Job Training Partnership Act (Formerly CETA)

44 Office of Vocational Rehabilitation

45 Income From Boarder/Lodger

46 Net Income From Rental of House, Store or Other Property

48 Income From Roomer

APPENDIX OF BUDGETING CODES

EARNED INCOME DISREGARD (EID)

- 1 LIF/ADC-Related Budget used if household was in receipt of MA under LIF or PA/MA during at least 1 month of the previous 4 and household is not entitled to either the \$30 and 1/3 or \$30.00 disregard.
- 4 LIF/ADC-Related use if household is entitled to receive the \$30 and 1/3 disregard for up to 4 months.
- 5 LIF/ADC-Related use if household is entitled to receive the \$30 disregard for up to 8 months.
- 6 LIF/ADC-Related use for household which did not have MA under LIF or PA/MA during 1 month of the previous 4 months or whose PA, Transitional MA or Child Support Extension expired.

AGE INDICATOR (AI)

- Y Greater Than 60 Years of Age
N Less Than 60 Years of Age

FUEL TYPE (FUEL TY)

- 0 Heat Included in Shelter Costs
- 1 Natural Gas
- 2 Oil
- 3 Electric
- 4 Coal
- 5 Other Fuel

RESOURCES (CD)

- 01 Cash on Hand
- 02 Bank Account
- 03 Stocks, Bonds, Securities
- 04 Promissory Notes
- 05 Mortgages, Conditional Sales Contracts
- 06 Trust Funds
- 07 PIA Savings Account (Only for **Budget Type 7-10** when Chronic Care Indicator is **X**)
- 08 Lump Sum Payments (Tax Refunds, Insurance Settlements, Inheritances, etc.)
- 10 German or Austrian Reparation Payments
- 19 Vehicle
- 42 Countable Cash Value (Life Insurance)
- 43 Endowment Insurance
- 44 Exempt *cash value* of Life Insurance for SSI-Related (face value \$1500 or less)
- 45 Burial Reserve Disregard for SSI-Related Budget (Enter amount of burial fund up to \$1500)
- 91 Client attests to resources above Medicaid Level (FHP) (For cases with a budget "From" date of July 1, 2005 or earlier)
- 98 Other Liquid Resource (including royalties and honoraria)

APPENDIX OF BUDGETING CODES

SHELTER TYPE (TY)

- 01 Rent
- 02 Rent Public
- 03 Own Home
- 04 Room and Board
- 05 Hotel Permanent
- 06 Hotel Temporary
- 11 Room Only
- 12 Non-Level II Treatment Facility
- 15 Congregate Care Level I (NYC, Nassau, Suffolk & Westchester)
- 16 Congregate Care Level II (NYC, Nassau, Suffolk & Westchester)
- 20 Emergency Assistance Rehousing Program
- 22 Shelter for Victim of Domestic Violence
- 23 Undomiciled
- 28 Congregate Care Level I (Upstate)
- 29 Congregate Care Level II
- 30 Scatter Site Homeless Housing Non Tier II/Non Tier II Less Than 3 Meals Daily
- 33 Homeless Shelter Tier II-Less Than Three Meals Daily
- 34 Homeless Shelter Tier II-Three Meals Daily
- 35 Homeless Shelter Non Tier I or Tier II (3 Meals Daily) Disallow add Allowance
Codes 01,02,03, and 13
- 36 Shelter for Homeless (Less Than 3 Meals Daily)
- 37 Residential Program for Victims of Domestic Violence (Less Than 3 Meals Daily)
- 42 Congregate Care Level III - Enhanced Residential Care (NYC, Nassau, Suffolk, Westchester and
Rockland)
- 44 Supportive/Specialize Housing - AIDS Related
- 51 Congregate Care Level III - Adult Homes and DOH Enriched Housing

TIME CODE (T)

- F Employed Full-Time or Part-Time
- N Employed in second job, for same person (No Work Deductions)

TRANSACTION TYPE (TRAN)

- 02 Opening
- 03 Reject (Output Only)
- 04 Change
- 07 Closing (Output)
- 10 Reopening
- 14 System Generated (Changes MA Cases to MSSSI)

APPENDIX OF BUDGETING CODES

UNEARNED INCOME EXEMPTION (EXMPT)

- 01 Health Insurance Premium
- 02 Court Ordered Support (Not Valid for Budget Types 1 & 2 after 01/01/91)
- 06 20% RSDI
- 11 One Third SSI Child Support
- 12 Cost of Living RSDI Increase Resulting in SSI Ineligibility
- 14 VA Aid and Attendance/Housebound
- 15 Social Security Benefit (DAC)
- 16 VA Limited Pension
- 17 VA Unusual Medical Expense (UME)
- 20 Other Amounts Limited by Designated Use
- 21 Medicare

UNEARNED INCOME SOURCE (SR)

- 01 Adoption
- 02 Alimony Subsidy
- 03 Any Dividend, Interest or Periodic Receipts from Stocks, Bonds, Mortgages, Bank Interest, Trust Funds, Annuities, Credit Union, Estates, Etc.
- 06 Child Support Payments
- 07 Disabled Veterans Benefits (Non-Service Connected)
- 10 GI Dependency Allotment
- 11 Disabled Veterans Benefits (Service Connected)
- 16 Gross Rental Income From Owned Home
- 18 Income From Friends or Non-Legally Responsible Relatives Outside the Household (Received on a Recurring Basis)
- 19 Income From Friends or Non-Legally Responsible Relative Outside the Household (Received on a Recurring Basis)
- 26 Lump Sum Payments
- 28 German Reparation Payments (LIF/S/CC Budget Type 07)
- 30 Income From (JTPA) Job Training Partnership Act (Formerly CETA)
- 31 Net Income From Rental of House, (LIF/S/CC Budget Type 07)
- 32 Net Royalties
- 33 NYS Disability Insurance
- 35 Railroad Retirement Benefit-Dependant
- 38 Railroad Retirement Benefit
- 39 Retirement Benefits (Pensions)
- 41 Sick Pay (Private Insurance)
- 42 Social Security Disability Benefit
- 43 Social Security Survivor's Benefit
- 44 Social Security Retirement
- 46 Social Security Benefit-Dependant
- 47 Social Security Benefit - DAC
- 48 Social Security (Pickle)

APPENDIX OF BUDGETING CODES

UNEARNED INCOME SOURCE (SR) CONT'D

- 49 Unemployment Insurance Benefit
- 50 Union Benefits
- 51 OVR (Office of Vocational Rehabilitation) Training Allowance
- 55 Veteran's Pensions or Benefits
- 59 Worker's Compensation
- 60 Income-In-Kind Provided by LRR Shelter (MA Only)
- 64 Income-In-Kind Provided by LRR Meals (MA Only)
- 70 Other Income-In-Kind
- 75 Deemed Income From a Stepparent
- 82 Contribution From a Stepparent
- 99 Other

EXPANDED ELIGIBILITY CODE (EEC)

- A AIDS Health Insurance Premium (AHIP)
- B All Categories (P,I,C,D)
- C Child(ren) Calculate Total Net Income. Compares h/h net income to 133% of the FPL children ages 1 through 5. BT's 01 and 05.
- D Child(ren) 6 through 19. Compares net income to 100% of the FPL (BT's 01 & 05).
- F FHP for 19-20 years old living with their parents and adults living with their children compare net income to 150% of the FPL.
- S FHP for S/CC
- N FHP for 19-20 Years Old Not Living With Parents. Currently 100% of Federal Poverty Level (Only Valid on Budget Type 01 and 05)
- H COBRA Insurance
- I Infants, Birth to 1 Year
- J Medicaid Family Planning Income Eligibility at or Below 200% FPL
- K Family Planning Income Eligibility at or Below 200% of the FPL (Budget Types 01,02 &04)
- P Pregnant Women and Infants. Compares total net income to 200% of the FPL (BT's 01 & 05).
- T Trans Med Assist. Compares the adjusted gross earned income to 185% of the FPL BT's 01)
- W Medicaid Buy-In For Working People with Disabilities

SSI RELATED DEEMING CODES (DM)

- 1 Deem to SSI Related Spouse
- 2 Deem to SSI Related to Child(ren)
- 3 Deem to SSI Related Spouse and SSI Related Child(ren)
- 4 No Deeming

LIVING ARRANGEMENT CODES (LA)

- 1 Single Person
- 2 Couples

APPENDIX OF BUDGETING CODES

MEDICARE SAVINGS PROGRAM (MSP)

A Allows all Buy-In Determination calculations outcomes in MABEL for QMB, SLIMB and QI1.

PERIOD (PER)

- 3 Weekly
- 4 Bi-Weekly
- 5 Semi-monthly
- 6 Monthly
- 7 Bi-monthly
- 8 Quarterly
- 9 Yearly

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