



# AGED, BLIND, AND DISABLED Medicaid 0-1

## Table of Contents

Supersedes: MA 01-(07/01/2016)

<u>Section Number</u>	<u>Title/Content</u>	<u>Revision Date</u>
0-1	Table of Contents	01/10/2026
0-2	Introduction	07/01/2016
0-3	Acronyms and Glossary	02/01/2025
<b>000 Tables and Standards</b>		
001	General Resource Limit	01/01/2026
002	Medically Needy Income Limit	01/01/2026
008	Categorically Needy Income Limit	01/01/2026
009	Medicare Savings Program Income Limit	04/01/2025
010	Montana Medicaid for Workers with Disabilities (MWD)	04/01/2025
011	Pickle Eligibility Income Limit	01/01/2026
012	Qualified Disabled Working Individuals ( QDWI)	04/01/2025
013	Nursing Home Residents	01/01/2026
014	Poverty Guild lines	04/01/2025
015	Standard Payment Amount	01/01/2022
016	Life Expectancy Table	4/01/2022
017	Life Estate Interest Table	07/01/2017

### **100 Application Processing**

101-1	Confidentiality	07/01/2016
102-1	Civil Rights	11/15/2024
102-2	General Complaints	07/01/2016
103-1	Application Processing	11/15/2024
103-2	Interview	07/01/2016
103-3	Client Rights and Responsibilities	07/01/2016
103-4	Verification and Documentation	04/01/2023
103-5	Processing	07/01/2016
103-6	Voter Registration	07/01/2016
104-1	Retroactive Medicaid Coverage	05/01/2017
105-1	Disability Determination	07/01/2017

### **200 Groups Covered**

200	General Overview	07/01/2016
201-1	SSI Eligibles	07/01/2024
201-2	Pickle Eligibility	07/01/2016
201-3	Early Widows and Widowers	07/01/2016
201-4	Social Security Increase of 1972	07/01/2016
201-5	Disabled Adult Children	07/01/2016
201-6	Medicaid for Workers with Disabilities (MWD)	05/01/2025
201-7	Qualified Disabled Working Individual (QDWI)	07/01/2016
201-8	Medicare Savings Program	05/01/2025
201-9	Residents in Medical Institutions prior to 10/1/1989	07/01/2016
202-1	Adding/Removing a Household Member	03/10/2022

### **300 Non-Financial Requirements**

300	Non-Financial Overview	07/01/2016
301-1	Citizenship and Identity	01/01/2025
301-2	Alien Status	01/01/2025
301-3	Emergency Status for Aliens	07/01/2016
302-1	State Residency	07/01/2016
302-2	Temporary Absence	01/11/2024
303-1	Social Security Number	07/01/2016
304-1	Health Insurance Coverage-Overview	07/01/2016
304-2	Health Insurance Coverage-HIPPS	07/01/2016
304-3	Health Insurance Coverage-Trauma Questionnaires	07/01/2016
304-4	Liens and Estate Recovery	07/01/2016
304-5	Maximum Out of Pocket	01/01/2018
305-1	Age	07/01/2016
306-1	Managed Care Program	07/01/2016
307-1	COBRA 75	10/01/2017
308-1	Application for Other Benefits	07/01/2016

#### **400 Resources**

400	Resource Overview	06/28/2022
401-1	Ownership, Accessibility, Equity Value	01/01/2026
402-1	Countable and Excluded Resources	01/01/2026
402-2	Native American Resources	07/01/2016
402-3	Trust Funds	03/01/2017
402-4	Conditional Assistance	07/01/2016
403-1	Vehicles	07/01/2016
404-1	Asset Transfers	07/01/2024
404-2	Penalty Period for Asset Transfers	07/01/2023
404-3	Asset Transfers Involving Life Estates	07/01/2016

404-4	Asset Transfers to Trusts on or after 8/11/93	07/01/2016
404-5	Pursuing Claims on Property and Estates	07/01/2016

### **500 Income**

500	Income Overview	09/01/2025
501-1	Unearned Income	01/01/2025
501-2	Native American Income	07/01/2016
502-1	Earned Income	01/01/2026
503-1	Self-Employment	04/01/2023

### **600 Eligibility & Benefit Determination**

601-1	Prospective Budgeting	07/01/2016
602-1	Income Disregards and Deductions	01/01/2026
603-1	Deeming	01/01/2026

### **700 Medically Needy**

700	Medically Needy Overview	03/01/2017
701-1	Cash Option	01/01/2022
701-2	Cash Option Refunds	01/01/2026
702-1	Medical Expense	01/01/2020

### **800 Residential Medical Institutions**

801-1	Penal Institutions	07/01/2016
802-1	Preadmission Screening	01/01/2023
803-1	Resource Assessment	12/01/2025
804-1	Long Term Care Partnership	07/01/2016
805-1	Budgeting	07/01/2016
805-2	Post Eligibility Treatment of Income (PETI)	01/01/2026
806-1	Montana State Hospital	07/01/2016

**900 Home & Community Based Services (HCBS)/Waiver**

900	HCBS/Waiver Overview	02/01/2025
901-1	HCBS/Waiver Income Budget	01/01/2026
902-1	HCBS/Waiver Medically Needy	07/01/2016

**1300 Health Insurance Portability and Accountability Act**

1300	HIPAA Creditable Coverage & Release of Information	07/01/2016
------	--	------------

**1500 Case Management**

1501-1	Reporting Changes	01/01/2025
1502-1	Renewals	11/01/2024
1503-1	Notices	01/01/2025
1504-1	Over Issuance/Under Issuance	07/01/2016
1505-1	Fair Hearing, Administrative Review & Appeals	07/01/2016
1506-1	Case Notes	07/01/2016
1507-1	Program Compliance/Quality Control Reviews	07/01/2016
1509-1	Case File Retention/Archive/Deconstruction	07/01/2016