



Combined Medicaid Manual

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	04/17/2026
0-2	Introduction	07/01/2016
0-3	Acronyms and Glossary	02/25/2025

000 Tables and Standards

CMA 001	General Resource Limit	01/01/2026
CMA 002	Medically Needy Income Limit	01/01/2026
ACA FMA 003	ACA Parent Caretaker Relative	04/01/2026
ACA FMA004	ACA Pregnancy Income	04/01/2026
ACA FMA 005	Healthy Montana Kids (HMK and HMKP)	04/01/2026
ACA FMA 006	Breast and Cervical Cancer Treatment	04/01/2026
ACA FMA 007	ACA Adult	04/01/2026
ABD 008	Categorically Needy Income Limit	04/01/2026
ABD 009	Medicare Savings Program Income Limit	04/01/2026
ABD 010	Montana Medicaid for Workers with Disabilities (MWD)	04/01/2026
ABD 011	Pickle Eligibility Income Limit	01/01/2023

ABD 012	Qualified Disabled Working Individuals (QDWI)	04/01/2024
ABD 013	Nursing Home Residents	01/01/2024
ABD 014	Poverty Guild lines	04/01/2024
ABD 016	Life Expectancy Table	4/01/2022
ABD 017	Life Estate Interest Table	07/01/2017
ACA FMA 018	Table of Standards- Plan First	04/01/2025

100 Application Processing

CMA 101-1	Confidentiality	07/01/2016
CMA 102-1	Civil Rights	11/15/2024
CMA 102-2	General Complaints	07/01/2016
CMA 103-1	Application Processing	02/01/2025
CMA 103-2	Interview	07/01/2016
CMA 103-3	Client Rights and Responsibilities	07/01/2016
CMA 103-4	Verification and Documentation	04/01/2023
CMA 103-6	Voter Registration	07/01/2016
CMA 104-1	Retroactive Medicaid Coverage	05/01/2017
ABD 105-1	Disability Determination	07/01/2017
FMA 105-1	Presumptive Medicaid	07/01/2016

200 Groups Covered

ABD 200	General Overview	07/01/2016
FMA 200	Covered Groups Overview	07/16/2016
FMA 200-1	ACA Filing Unit	07/01/2023
ABD 201-1	SSI Eligibles	07/01/2016
FMA 201-1	ACA Parent Caretaker Relative	07/01/2016
ABD 201-2	Pickle Eligibility	07/01/2016
FMA 201-2	ACA Pregnancy	07/01/2016

ABD 201-3	Early Widows and Widowers	07/01/2016
FMA 201-3	Child Newborn	07/01/2016
ABD 201-4	Social Security Increase of 1972	07/01/2016
FMA 201-4	Healthy Montana Kids Plus	01/01/2026
ABD 201-5	Disabled Adult Children	07/01/2016
CMA 201-5	ACA Healthy Montana Kids (HMK)	01/01/2026
ABD 201-6	Medicaid for Workers with Disabilities (MWD)	10/01/2018
FMA 201-6	Former Foster Care	04/01/2023
ABD 201-7	Qualified Disabled Working Individual (QDWI)	07/01/2016
FMA 201-7	ACA Adult	05/01/2025
ABD 201-8	Medicare Savings Program	07/01/2016
FMA 201-8	ACA Adult Medicaid	05/02/2024
ABD 201-9	Residents in Medical Institutions prior to 10/1/1989	07/01/2016
FMA 201-9	Breast and Cervical Cancer	05/02/2024
FMA 201-10	Family Medicaid Needy	07/01/2016
FMA 201-11	ACA Qualified Pregnant Woman	02/01/2025
FMA 201-12	Extended Postpartum	07/01/2023
FMA 201-13	Transitional Medicaid	11/01/2025
FMA 201-14	Plan First	12/01/2020
CMA 202-1	Adding or Removing Household Members	10/20/2022

300 Non-Financial Requirements

CMA 300	Non-Financial Overview	07/01/2016
CMA 301-1	Citizenship and Identity	10/20/2022
CMA 301-2	Alien Status	12/01/2024
CMA 301-3	Emergency Status for Aliens	07/01/2016
CMA 302-1	State Residency	07/01/2016
CMA 302-2	Temporary Absence	01/11/2024

CMA 302-3	Incarcerated Individual	01/01/2025
CMA 303-1	Social Security Number	06/04/2024
CMA 304-1	Health Insurance Coverage-Overview	07/01/2016
CMA 304-2	Health Insurance Coverage-HIPPS	07/01/2016
CMA 304-3	Trauma Questionnaires	07/01/2016
CMA 304-4	Liens and Estate Recovery	07/01/2023
CMA 304-5	Maximum Out of Pocket	01/01/2018
CMA 305-1	Age	07/01/2016
CMA 306-1	Managed Care Program	07/01/2016
CMA 307-1	COBRA 75	10/01/2017
CMA 308-1	Application for Other Benefits	07/01/2016
FMA 308-2	Common Law Marriage	07/01/2016
FMA 309-1	Healthy Montana Kids-Other Insurance	11/01/2022

400 Resources

CMA 400	Resource Overview	06/30/2022
CMA 401-1	Ownership, Accessibility, Equity Value	09/01/2025
CMA 402-1	Countable and Excluded Resources	01/01/2026
CMA 402-2	Native American Resources	07/01/2016
CMA 402-3	Trust Funds	06/01/2022
ABD 402-4	Conditional Assistance	07/01/2016
CMA 403-1	Vehicles	07/01/2016
CMA 404-1	Asset Transfers	07/01/2024
CMA 404-2	Penalty Period for Asset Transfers	07/01/2025
CMA 404-3	Asset Transfers Involving Life Estates	07/01/2016
CMA 404-4	Asset Transfers to Trusts on or after 8/11/93	07/01/2016

ABD 404-5	Pursuing Claims on Property and Estates	07/01/2016
-----------	---	------------

500 Income

CMA 500	Income Overview	09/01/2025
---------	-----------------	------------

CMA 501-1	Unearned Income	12/26/2024
-----------	-----------------	------------

CMA 501-2	Native American Income	06/01/2016
-----------	------------------------	------------

CMA 502-1	Earned Income	01/01/2026
-----------	---------------	------------

CMA 503-1	Self-Employment	04/01/2023
-----------	-----------------	------------

600 Eligibility & Benefit Determination

CMA 601-1	Prospective Budgeting	07/01/2016
-----------	-----------------------	------------

CMA 602-1	Income Disregards and Deductions	01/01/2026
-----------	----------------------------------	------------

CMA 603-1	Deeming	01/01/2026
-----------	---------	------------

700 Medically Needy

CMA 700	Medically Needy Overview	03/01/2017
---------	--------------------------	------------

CMA 701-1	Cash Option	01/01/2022
-----------	-------------	------------

CMA 701-2	Cash Option Refunds	01/01/2026
-----------	---------------------	------------

CMA 702-1	Medical Expense	01/01/2020
-----------	-----------------	------------

800 Residential Medical Institutions

ABD 800	Residential Medical Institutions Overview	07/01/2024
---------	---	------------

CMA 801-1	Penal Institutions	07/01/2023
-----------	--------------------	------------

CMA 802-1	Preadmission Screening	01/01/2023
-----------	------------------------	------------

CMA 803-1	Resource Assessment	12/01/2025
-----------	---------------------	------------

ABD 804-1	Long Term Care Partnership	07/01/2016
-----------	----------------------------	------------

FMA HMK 804-1	Public and Mental Disease Institutions	07/01/2016
---------------	--	------------

ABD 805-1	Budgeting	07/01/2016
-----------	-----------	------------

FMA 805-1	Residential Chemical Dependency Treatment	07/01/2016
-----------	---	------------

ABD 805-2	Post Eligibility Treatment of Income (PETI)	01/01/2024
ABD 806-1	Montana State Hospital	07/01/2016
FMA 806-1	Intermediate Care/Psychiatric Residential Treatment	07/01/2016

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

FMA 900 Child Support Overview

ABD 900	HCBS/Waiver Overview	02/01/2025
FMA 900	Child Support Overview	01/01/2016
ABD 901-1	HCBS/Waiver Income Budget	01/01/2026
FMA 901-1	Child Support Cooperation	01/01/2016
ABD 902-1	HCBS/Waiver Medically Needy	07/01/2016

FMA 1000	Foster Care Overview	07/01/2016
-----------------	----------------------	------------

FMA 1001	Subsidized Adoption Overview	07/01/2016
-----------------	------------------------------	------------

1300 Health Insurance Portability and Accountability Act

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

1500 Case Management

CMA 1501-1	Reporting Changes	01/01/2025
CMA 1502-1	Renewals	11/01/2024
CMA 1503-1	Timely and Adequate Notice	01/01/2025
CMA 1504-1	Over Issuance/Under Issuance	07/01/2016
CMA 1505-1	Fair Hearing, Administrative Review & Appeals	07/01/2016
CMA 1506-1	Case Notes	07/01/2016
CMA 1507-1	Program Compliance/Quality Control Reviews	07/01/2016
CMA 1508-1	Good Cause	07/01/2016

CMA 1509-1

Case File Retention/Archive/Destruction

04/01/2025

Revised:
03/19/2026