

START

HERE

Does the individual

expect to file a

DHCS Guide for Calculating MAGI Medi-Cal Individual Household Size

Household Size Flow Chart

Based on § 435.603(f) of the final Medicaid regulations.

Instructions:

Person-based; Complete for each individual since there could be different household sizes within same applicant family.
Use Key Characteristics Table and Household Diagram Worksheets on next two pages to prepare for this flow chart



* If a State verifies household composition and a taxfiler cannot reasonably establish that another individual is a tax dependent of the taxfiler for the tax year in which Medicaid is sought, the inclusion of such individual in the household of the taxfiler is determined by the non-filer rules listed above



Key Characteristics Table

Instructions:

- ✓ Using Information for each household/family member, capture key characteristics in the table below.
- ✓ Use this table of characteristics to walk through the flow on the page above to construct the Household Member Set and Family Size in the last column of the table

#	Household Member	Tax Filer?	Tax Dpdnt of #	Excep 1? **	Excep 2? **	Excep 3? **	Married to #	Living with #'s	Filing with #	Pregnant?	Resultant HH Members (#'s)	HH Size
1		Y / N		Y / N	Y / N	Y / N				Y / N		
2		Y / N		Y / N	Y / N	Y / N				Y / N		
3		Y / N		Y / N	Y / N	Y / N				Y / N		
4		Y / N		Y / N	Y / N	Y / N				Y / N		
5		Y / N		Y / N	Y / N	Y / N				Y / N		
6		Y / N		Y / N	Y / N	Y / N				Y / N		
7		Y / N		Y / N	Y / N	Y / N				Y / N		
8		Y / N		Y / N	Y / N	Y / N				Y / N		
9		Y / N		Y / N	Y / N	Y / N				Y / N		
10		Y / N		Y / N	Y / N	Y / N				Y / N		

** Exceptions Defined:

1. Someone other than the spouse or child (biological, adopted, or step; minor or adult) of the taxpayer.

2. Under the age of 19 or under 21 if a full time student who expects to be claimed as a tax dependent and is <u>living</u> with both parents but whose parents do not expect to file a joint tax return.

3. Under age 19 or under age 21 if full time student and the taxpayer is the individual's non-custodial parent.



Household Diagram Worksheets

Instructions:

- ✓ Using Information for each household member to first capture the Household Diagram for all individuals on an application.
- ✓ Use the other drawing boxes to illustrate, for each individual, the household diagram for each individual. Use a copy this page for more than 8 household members.

Application Household Diagram	Tax filer Household Diagram	Individual Household Diagram
Individual Household Diagram	Individual Household Diagram	Individual Household Diagram
Individual Household Diagram	Individual Household Diagram	Individual Household Diagram