LOUISIANA DEPT. OF HEALTH & HOSPITALS

Medicaid Eligibility Data System

External Design Part 1d: Core System Budgets

Table of Contents

DOCUMENT INFORMATION **5**

REVISION SUMMARY 5

INITIAL BUDGET DATA **7**

C Related Budget Questions (BDAC) *7*
LTC/Waiver Budget Questions (BDAL) *10*
Other Budget Questions (BDAO) *12*
Initial Budget Data Browse 13
Non Budget Member Income Summary (NBMBR) *17*
Non-Budget Member and corresponding Budget Question *19*
Non Budget Member Income (NBMRI) *20*
Non Budget Member Income Browse 21
Case Earned Income Pop-Up 22
Case Self-Employed Business Expenses Pop-Up 23
Case Unearned Income Pop-Up 24
Person Month Income/Expense Summary (PIES) *25*
Person Monthly Income/Expense Browse 27
Person Earned Income Pop-Up 28
Hours Worked and Taxes Withheld (for MPP Reporting) Pop-up 31
Person Self-Employed Business Expenses Pop-Up 33
Person Unearned Income Pop-Up 35
Person Monthly Expenses 36
Dependent Care Info Pop-Up 37
Medical Expenses Deduction (LTC) 38

BUDGET WORKSHEET SUBSYSTEM **39**

BUDGET WORKSHEET MAINTENANCE 40
BUDGET MEMBER MAINTENANCE 47
BUDGET SECTION CAPTURE PROCESS 50
Earned Income Exemption Processing Rules *51*
Line types *52*
Determining Budget Values for Line Type D (Data) *55*
Earned Income Amount Frequency pop-up Window: *59*
Multiple Income Types pop-up Window: *60*
Medical Expenses Deduction pop-up Window: *61*
General Navigation Rules for Next key processing: *62*
Budget Section Capture *63*
Budget Pretest Section Maintenance *65*
185% Pretest on LIFC/PAP templates 68
Budget Member Calculation / Post Eligibility Section Maintenance *70*
Budget Spenddown Section Maintenance *74*
Budget Extended Medicaid Section Maintenance *77*
Budget Eligibility Section Maintenance *80*
Budget Post Eligibility Completion Section Maintenance *87*
BUDGET CHECKING PROCESS 89
Budgets to be Checked by Supervisor *89*
Budget Checking Function *90*
SELECT ALTERNATE WORKER ASSIGNMENT 92

BUDGET INQUIRIES **94**

DETERMINATIONS BY CASE INQUIRY 95
BUDGETS BY CASE INQUIRY 96
BUDGETS IN PROGRESS INQUIRY 97
BUDGETS TO BE CHECKED INQUIRY 98
BUDGET SECTION INQUIRY 99
SPENDDOWN BILLS BY CASE INQUIRY 100

BUDGET REPORT (MEN0040) 101

PAGE 1: BUDGET DESCRIPTION 102
PAGE 2: MEMBER CALCULATION SECTION / POST ELIGIBILITY SECTION 103
PAGE 3: ELIGIBILITY SECTION 104
PAGE 4: PRETEST SECTION 105
PAGE 5: SPENDDOWN SECTION 106
PAGE 6: EXTENDED MEDICAID SECTION 107

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Revision Summary

The following revisions have been made to the document since it was first published:

Date	Description of Change	By
4/29/2003	Revised with RedMane templates	M. Smutko
5/8/2003	Add (L)ast action to view previous record – SIR799	L. Nel
8/11/2003	Add PLI amount on Determination Outcome pop-up – SIR848	L. Nel
9/2/3003	Add Online message for MSP Certifications – SIR807	L. Nel
10/6/2003	Add Q25 'Is SSI client expected to be in facilty for 3 mnths or less?' to BDAL – SIR783	L.Nel
10/13/2003	Change Incurred Medical Expenses to Medical Expenses Deduction – SIR884	L. Nel
10/14/2003	Add edits to check Non-Budget Members vs Budget questions – SIR919	L. Nel
12/30/2003	Add Medicaid Purchase Plan – SIR784	L Nel
1/5/2003	New Type Case for CHAMP PW Interim Certs (03-104) – new templates CHMPW1/2/3 – SIR966	L. Nel
5/24/2004	Remove dimes down rounding on every COLA line and round final COLA amount down to the nearest dollar - SIR1009	L. Nel

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Date	Description of Change	By
5/24/2004	Add new budget questions 28 and 29 for pickle (ANSWER-Q28 and ANSWER-Q29) - SIR1009 Was SSI lost due to the receipt of RSDI (not a COLA)? Was SSI lost due to recpt of inc other than Ttl II RSDI?	Vincent Tlhapi
9/1/2004	BDGT Purge: Do not allow a budget to be purged if it is linked to a rejected application – SIR 953.	Vincent Tlhapi
11/22/2004	Remove conversion factors for weekly and bi weekly frequencies – SIR1130	Lizette Nel
12/2/2004	Add Purge action to BDAL, BDAC and BDAO – SIR1092	Lizette Nel
12/22/2004	Can not link incomplete or eligible budget to rejection at APTC	Karl Powers
1/20/2005	Add ANSWER-Q27 – Actual Contribution entered - SIR915	Lizette Nel
3/14/2005	Change income limits for QMB budget - SIR1164	Lizette Nel
8/15/05	Show all error messages in one pass - SIR 1057	Karl Powers
11/21/2005	Add ANSWER-Q30 – LIS (SIR1238)	Lizette Nel
12/05/05	Show nbr of eligible days on partial PLI - SIR 975	Karl Powers
06/27/2007	Change Personal Care Needs: allow $128 instead of $90 (SIR1394).	Karl Powers
2/26/2008	Update Spec – Add Answer 31 and 32	Niki Wells
5/19/2008	Update BDGT and PIES screen with PF7 – CSUM key (SIR1479)	Lauren O'Neil
3/31/2011	Remove actual numbers and names from screens (SIR1701)	Jacobus Badenhorst

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Initial Budget Data

There are three separate screens to be used for entering Initial Budget Data. One for C Related budgets (Child), one for LTC Related budgets (Long Term Care) and one for all other budgets. The screen to be used depends on the Category/Type Case of the budget being entered. Use MERCATL to determine whether the budget being input is Child Related, Long Term Care Related or neither. The questions are different depending on which screen is used. There are 32 questions in all and the answers to these questions are stored in the Initial Budget Data file as answers 1 thru 12, 19 and 21 thru 27 and 32. There is an LDA that holds the question text for use as help when the user is setting up the budget templates. The questions are hard coded on the three screens and must correspond to the LDA.

Tech note: the answers for the budget questions are stored in file ME-CASE-BUDGET-INFO

C Related Budget Questions (BDAC)

```
Message Line
      BDAC                    *** M.E.D. SYSTEM ***                *DATE
      MEBCBIF1             C-RELATED BUDGET QUESTIONS              *TIME
                                                                   *LIBRARY-ID
 *Action      : _ (A,B,C,D,M,N,P,L)
 *CASE NUMBER : _____________
 *MONTH       : __ / ____ (MM/YYYY)

  If the applicant is pregnant, how many unborns are there?      : _
  Is there a stepparent in the home?                             : _ (Y/N)
  How many children of own does the stepparent have in the home? : __
  For Possible Deeming Parent(s) Income to MUM applicant only:
      Total persons in household not in Assistance Unit?         : __
  Is there a LIFC child who is a student with Earned Income?     : _
  Are there medical bills available for Spend-down, if needed?   : _ (Y/N)



 Use PF6 for Non Budget Member Income for this case

 Copy from: *Case Number : _____________  *Month : __ / ____
 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit        NBMbr             BMbr  BSec
```

This screen is used to enter initial information about a budget for Child Related budgets.

Fields

Action (A1)

The action to be taken on the Child Related Initial Budget Data Maintenance Screen. The valid action codes for this screen are (A)dd, (B)rowse, (C)lear, (D)isplay, (M)odify, (N)ext, (P)urge and (L)ast. This field is mandatory. Help is available for this field.

CASE NUMBER (N13)

The number that identifies the Case. This field is mandatory. The client name will be displayed. Help is available for this field.

MONTH (N6)

The month the budget questions is for. Default to budget date if coming from any budget screens. Help is available on this field. Show all months that have budget questions for this case.

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If the applicant is pregnant, how many unborns are there? (N1)
This answer is stored in field ANSWER-Q3. Text of this question on the screen must correspond to Q3 in LDA for Budget Info Questions.

Is there a stepparent in the home? (A1)
This answer is stored in field ANSWER-Q1. Valid Values: Y, blank. Text of this question on the screen must correspond to Q1 in LDA for Budget Info Questions.

How many children of own does the stepparent have in the home? (N2)
This answer is stored in field ANSWER-Q2. Text of this question on the screen must correspond to Q2 in LDA for Budget Info Questions.

Total persons in household not in Assistance Unit? (N2)
This answer is stored in field ANSWER-Q4. Text of this question on the screen must correspond to Q4 in LDA for Budget Info Questions.

Is there a LIFC child who is a student with Earned Income?
This answer is stored in field ANSWER-Q19. Text of this question on the screen must correspond to Q19 in LDA for Budget Info Questions.

Are there any medical bills available for Spend-down, if needed? (A1)
This answer is stored in field ANSWER-Q5. Text of this question on the screen must correspond to Q5 in LDA for Budget Info Questions.

Copy From
The worker will be able to copy Initial Budget Questions from another case and/or month. The worker will then be able to change any answers that are different.

Copy From Case Number (N13)
The case number which the copy from budget questions are attached. This field is mandatory if the Copy From Month is entered. This field is only available if the action is Add. Default to case number from above if available.

Copy From Month (N6)
The month of the copy from budget information. This field is only available if the action is Add. Default to month from above if available.

Processing

Add Processing

On an add if the worker has specified copy fields then copy the data from the case/month specified into the new record being added. This also includes copying all the case/person income records for this case/month.

PF Keys

PF-Key 6 – NBMbr
This key will invoke the Non Budget Member Income Summary screen to enter the income details for any persons who have income to be considered but are not budget members. e.g. second parent, ineligible children.

PF Key 9 -BMbr
This key will point to the Budget Member Maintenance function.

PF Key 10 - BSec
This key will point to the Budget Section Maintenance screen.

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PF Key 11 - Next

If there are any non-budget members, then this key will point to the Non-Budget Member Income Summary screen. If there are no non-budget members, then this key will point to the first budget section to be input.

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LTC/Waiver Budget Questions (BDAL)

```
Message Line
      BDAL                    *** M.E.D. SYSTEM ***                *DATE
      MEBCBIF2             LTC/WAIVER BUDGET QUESTIONS             *TIME
                                                                   *LIBRARY-ID
 *Action      : _ (A,B,C,D,M,N,P, L)
 *CASE NUMBER : _____________
 *MONTH       : __ / ____ (MM/YYYY)
 Does client have spouse also applying in the same facility?  : _ (Y/N)
 Does the client have a spouse who remains at home?           : _ (Y/N)
 How many applicant's dependents in home with commnty spouse? : __
 How many applicant's dependents not with commnty spouse?     : __
 Enter actual contribution to Spouse/Dep. if < max allowable  : _____________
 Form 142 Approval Date, if new admit, to determ. partial PLI : __ / __ / ___
 Is SSI client expected to be in facilty for 3 mnths or less? : _ (Y/N)
 Vendor Payment Start Date for Transfer of Resource Penalty   : __ / __ / ___
For Possible Deeming:
     Is there 2nd parent in home for parent-to-child deeming? : _ (Y/N)
     How many ineligible children in the home?                : __
 Are there medical bills available for Spend-down, if needed? : _ (Y/N)
Use PF6 for Non Budget Member Income for this case
Copy from: *Case Number : _____________   *Month : __ / ____
 *Tran: _______ Act: _ Key: ____________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit        NBMbr             BMbr  BSec
```

This screen is used to enter initial information about a budget for Long Term Care Related budgets.

Fields

Action, CASE NUMBER, MONTH

See C Related above. Functionality is exactly the same.

Does the client have a spouse also applying in the same facility? (A1)

This answer is stored in field ANSWER-Q22. Text of this question on the screen must correspond to Q22 in LDA for Budget Info Questions.

Does the client have a spouse who remains at home? (A1)

This answer is stored in field ANSWER-Q7. Text of this question on the screen must correspond to Q7 in LDA for Budget Info Questions.

How many applicant's dependents in home with community spouse? (N2)

This answer is stored in field ANSWER-Q8. Text of this question on the screen must correspond to Q8 in LDA for Budget Info Questions. This question must be blank if Q7 '*Does the client have a spouse who remains at home?* is (N)o or blank, otherwise it can be entered.

How many applicant's dependents not with community spouse? (N2)

This answer is stored in field ANSWER-Q9. Text of this question on the screen must correspond to Q9 in LDA for Budget Info Questions.

Enter actual contribution to Spouse/Dep. if < max allowable (N9.2)

This answer is stored in field ANSWER-Q21. Text of this question on the screen must correspond to Q21 in LDA for Budget Info Questions. If an actual contribution (0.00 – 999999999.99) is entered, ANSWER-Q27 is set to 'Y'es. This is used in the LTC and LTCMNP templates to distinguish between a 0.00 actual contribution versus nothing entered by the Analyst.

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Form 142 approval Date, if new admit, to determ. partial PLI (N8)
This answer is stored in field ANSWER-Q10. Text of this question on the screen must correspond to Q10 in LDA for Budget Info Questions. Format: MM/DD/YYYY. Must be a valid date.

Is SSI client expected to be in facilty for 3 mnths or less? (A1)
This answer is stored in field ANSWER-Q25. Text of this question on the screen must correspond to Q25 in LDA for Budget Info Questions. Valid values are 'Y', 'N' or Blank.

Vendor Payment Start Date for Transfer of Resource Penalty (N8)
This answer is stored in field ANSWER-31. Text of this question on the screen must correspond to Q31 in LDA for Budget Info Questions. Format: MM/DD/YYYY. Must be a valid date

Is there 2nd parent in home for parent-to-child deeming? (A1)

This answer is stored in field ANSWER-Q12. Text of this question on the screen must correspond to Q12 in LDA for Budget Info Questions.

How many ineligible children in the home? (N2)
This answer is stored in field ANSWER-Q11. Text of this question on the screen must correspond to Q11 in LDA for Budget Info Questions.

Are there any medical bills available for Spend-down, if needed?
This answer is stored in field ANSWER-Q5. Text of this question on the screen must correspond to Q5 in LDA for Budget Info Questions. Programmer note this is question 5 as it is the same question as one on C related screen.

Copy From, Copy From Case Number and Copy From Month
See C Related above. Functionality is exactly the same.

Processing

Same as C related screen functionality.

PF Keys

Same as C related screen functionality.

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Other Budget Questions (BDAO)

```
Message Line
      BDAO                    *** M.E.D. SYSTEM ***                *DATE
      MEBCBIF3                OTHER BUDGET QUESTIONS               *TIME
                                                                   *LIBRARY-ID
 *Action      : _ (A,B,C,D,M,N,P,L)
 *CASE NUMBER : _____________
 *MONTH       : __ / ____ (MM/YYYY)

  Does the client have a spouse who is categorically eligible?  : _ (Y/N)
  For Possible Deeming:
    Is there 2nd parent in home for parent-to-child deeming?    : _ (Y/N)
    How many ineligible children in the home?                   : __
    Does the alien sponsor have a spouse in the home?           : _ (Y/N)
    Enter # inelig children/tax dependents of alien sponsor     : __
  Are there medical bills available for Spend-down, if needed?  : _ (Y/N)
  For LIS:
    Enter # of qualified dep children and dep relatives in home : __
  For FOA:
  Does someone in the home pay the child's Medical Insurance? : _ (Y/N)
 Use PF6 for Non Budget Member Income for this case

 Copy from: *Case Number : _____________  *Month : __ / ____
 *Tran: _______ Act: _ Key: ____________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit        NBMbr             BMbr  BSec
```

This screen is used to enter initial information about a budget for non C related and non Long Term Care Related budgets.

Fields

Action, CASE NUMBER, MONTH

See C Related above. Functionality is exactly the same.

Does the client have a spouse who is categorically eligible? (A1)

This answer is stored in field ANSWER-Q6. Text of this question on the screen must correspond to Q6 in LDA for Budget Info Questions.

Is there 2nd parent in home for parent-to-child deeming? (A1)

This answer is stored in field ANSWER-Q12. Text of this question on the screen must correspond to Q12 in LDA for Budget Info Questions.

How many ineligible children in the home? (N2)

This answer is stored in field ANSWER-Q11. Text of this question on the screen must correspond to Q11 in LDA for Budget Info Questions.

Does the alien sponsor have a spouse in the home? (A1)

This answer is stored in field ANSWER-Q23. Text of this question on the screen must correspond to Q23 in LDA for Budget Info Questions.

Enter # inelig children/tax dependents of alien sponsor (N2)

This answer is stored in field ANSWER-Q24. Text of this question on the screen must correspond to Q24 in LDA for Budget Info Questions.

Are there medical bills available for Spend-down, if needed?

This answer is stored in field ANSWER-Q5. Text of this question on the screen must correspond to Q5 in LDA for Budget Info Questions. Programmer note: this is question 5 as it is the same question as one on C related screen.

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Enter # of qualified dep children and dep relatives in home

This answer is stored in field ANSWER-Q30. Text of this question on the screen must correspond to Q5 in LDA for Budget Info Questions.

Does someone in the home pay the child's Medical Insurance? (A1)

This answer is stored in field ANSWER-Q32. Text of this question on the screen must correspond to Q32 in LDA for Budget Info Questions

Copy From, Copy From Case Number and Copy From Month

See C Related above. Functionality is exactly the same.

Processing

Same as C related screen functionality.

PF Keys

Same as C related screen functionality.

Initial Budget Data Browse

```
Message Line -
                              *** M.E.D. SYSTEM ***                  *DATE
     MEBCBIB                 BUDGET QUESTIONS BROWSE                 *TIME    5 >


  Case Number  Month     Client Name
 ------------- ------ ------------------------------
 _____________ ______ ______________________________
 _____________ ______ ______________________________
 _____________ ______ ______________________________
 _____________ ______ ______________________________
 _____________ ______ ______________________________
 _____________ ______ ______________________________
 _____________ ______ ______________________________
 _____________ ______ ______________________________
 _____________ ______ ______________________________
 _____________ ______ ______________________________
 _____________ ______ ______________________________

 Case Number: _____________ Month: ______
 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit              Back  Fwrd        Left  Rght
```


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```
Message Line -
                                *** M.E.D. SYSTEM ***                 *DATE
 < 1 MEBCBIB                   BUDGET QUESTIONS BROWSE                *TIME    4 >

                      Stepparent  Num steppars.  Num unborn   Num in    Med bills
                        in the      children     if applcnt  household  avail for
  Case Number  Month    home?    in the home?    pregnant   not in AU  spenddown
 ------------- ------ ---------  ------------   ----------  ---------  ---------
 _____________ ______     _          __              _         __          _
 _____________ ______     _          __              _         __          _
 _____________ ______     _          __              _         __          _
 _____________ ______     _          __              _         __          _
 _____________ ______     _          __              _         __          _
 _____________ ______     _          __              _         __          _
 _____________ ______     _          __              _         __          _
 _____________ ______     _          __              _         __          _
 _____________ ______     _          __              _         __          _
 _____________ ______     _          __              _         __          _
 _____________ ______     _          __              _         __          _

 Case Number: _____________ Month: ______
 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit              Back  Fwrd        Left  Rght
```

```
Message Line -
                                *** M.E.D. SYSTEM ***                 *DATE
 < 2 MEBCBIB                   BUDGET QUESTIONS BROWSE                *TIME    3 >

                                              Num dependents    Num dependents
                        Spouse     Spouse      in home with       not with
  Case Number  Month   applying?  at home?  community spouse  community spouse
 ------------- ------  ---------  --------  ----------------  ----------------
 _____________ ______      _         _           __                  __
 _____________ ______      _         _           __                  __
 _____________ ______      _         _           __                  __
 _____________ ______      _         _           __                  __
 _____________ ______      _         _           __                  __
 _____________ ______      _         _           __                  __
 _____________ ______      _         _           __                  __
 _____________ ______      _         _           __                  __
 _____________ ______      _         _           __                  __
 _____________ ______      _         _           __                  __
 _____________ ______      _         _           __                  __

 Case Number: _____________ Month: ______
 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit              Back  Fwrd        Left  Rght
```


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```
Message Line -
                                *** M.E.D. SYSTEM ***                 *DATE
 < 3 MEBCBIB                   BUDGET QUESTIONS BROWSE                *TIME    2 >

                           LTC         Num     Client has  Student
                         facility   ineligible spouse in    with     Actual
  Case Number  Month    entry date   children  the home?   Income  Contribution
 ------------- ------   ----------   --------  ----------  ------- ------------
 _____________ ______   ____-__-__      __        _          _    _____________
 _____________ ______   ____-__-__      __        _          _    _____________
 _____________ ______   ____-__-__      __        _          _    _____________
 _____________ ______   ____-__-__      __        _          _    _____________
 _____________ ______   ____-__-__      __        _          _    _____________
 _____________ ______   ____-__-__      __        _          _    _____________
 _____________ ______   ____-__-__      __        _          _    _____________
 _____________ ______   ____-__-__      __        _          _    _____________
 _____________ ______   ____-__-__      __        _          _    _____________
 _____________ ______   ____-__-__      __        _          _    _____________
 _____________ ______   ____-__-__      __        _          _    _____________

 Case Number: _____________ Month: ______
 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit              Back  Fwrd        Left  Rght
```

```
Message Line
                                *** M.E.D. SYSTEM ***                 *DATE
 < 4 MEBCBIB                   BUDGET QUESTIONS BROWSE                *TIME   1 >

                           Spouse     Alien sponsor  # inelig/tax  In facility
                         applying in     spouse     dependents of  for 3 months
  Case Number  Month    same facility    in home    alien sponsor    or less
 ------------- -------  ------------- ------------- -------------  ------------
 _____________ _______      _             _             __             _
 _____________ _______      _             _             __             _
 _____________ _______      _             _             __             _
 _____________ _______      _             _             __             _
 _____________ _______      _             _             __             _
 _____________ _______      _             _             __             _
 _____________ _______      _             _             __             _
 _____________ _______      _             _             __             _
 _____________ _______      _             _             __             _
 _____________ _______      _             _             __             _
 _____________ _______      _             _             __             _
 _____________ _______      _             _             __             _
 Case Num: _____________ Month: __ / ____
 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit              Back  Fwrd        Left  Rght
```


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```
Message line
                              *** M.E.D. SYSTEM ***                 *DATE
 < 5 MEBCBIB                 BUDGET QUESTIONS BROWSE                *TIME

                      # of Childrn who # of Children Transfer of
                       Client is resp   /dependant   Resource   Childs Medical
 Case Number  Month    for NOT in AU    relatives    Penalty    Expenses pd
------------- ------- --------------- ------------- ------------- -------------
_____________ _______      __              ____________________________________
 _____________ _______      __              ____________________________________
 _____________ _______      __              ____________________________________
 _____________ _______      __              __ _________________________________
 _____________ _______      __              ____________________________________
 _____________ _______      __              ____________________________________
 _____________ _______      __              ____________________________________
 _____________ _______      __              ____________________________________
 _____________ _______      __              ____________________________________
 _____________ _______      __              ____________________________________
 _____________ _______      __              ____________________________________
 _____________ _______      __              ____________________________________
 Case Num: _____________ Month: __ / ____
 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit              Back  Fwrd        Left  Rght
```

Display rows in case number / month order. Latest month first.

Client Name is displayed for case.

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Non Budget Member Income Summary (NBMBR)

```
Message Line -
      NBMBR               *** M.E.D. SYSTEM ***                    *DATE
      MEBNIUB        NON BUDGET MEMBER INCOME SUMMARY              *TIME
                                                                   *LIBRARY-ID
  CASE NUMBER : _____________ ______________________________
  MONTH       : __ / ____
                                                                     Ern UnE
 *Cmd Inc Contributor  Person Num         Name            Birth Date Inc Inc
  --- -----------------  ------------- -------------------- ---------- --- ---
   _  2nd Parent      :  _____________ ____________________ __/__/____  _   _
   _  Comm Spouse     :  _____________ ____________________ __/__/____  _   _
   _  Sponsor Spouse  :  _____________ ____________________ __/__/____  _   _
   _  Inelig Child 1  :  _____________ ____________________ __/__/____  _   _
   _  Inelig Child 2  :  _____________ ____________________ __/__/____  _   _
   _  Inelig Child 3  :  _____________ ____________________ __/__/____  _   _
   _  Inelig Child 4  :  _____________ ____________________ __/__/____  _   _
   _  Dependent 1     :  _____________ ____________________ __/__/____  _   _
   _  Dependent 2     :  _____________ ____________________ __/__/____  _   _
   _  Dependent 3     :  _____________ ____________________ __/__/____  _   _
   _  Dependent 4     :  _____________ ____________________ __/__/____  _   _

 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit        NBMri
```

This screen is used to enter income information required for this case for people who are not members on the case. A non budget member with income may or may not have a MEDS Person Number. For people with a Person Number the user enters the Person Number and the system retrieves the income info for them if there is any.

Fields

CASE NUMBER (N13)
: The number and client name of the case which identifies the Case. Display only.

MONTH (N6)
: The month which the information is for. Display only.

Cmd (A1)
: The action to be taken on the Non Budget Member Income Summary Screen. The valid action codes for this screen are (A)dd, (P)urge and (M)odify.. This field is mandatory. Help is available for this field.

Inc Contributor (A16)
: The type of income contributor this income is for. LDA METICTL defines the valid income contributor types. There are 11 input lines on this screen, one for each income contributor in the METICTL array.

Person Num (N13)
: The person number of this income contributor if the person is defined to MEDS.

Name (A12)
: Name of the income contributor.

Birth Date (MM/DD/YYYY)
: Date of birth of the income contributor.

Ern Inc
: A ‘Y’es is displayed if the income contributor has earned income otherwise it is blank.

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UnE Inc

A ‘Y’es is displayed if the income contributor has unearned income otherwise it is blank.

PF Keys

PF-Key 6 – NBMri

This key will invoke the Person Month Income/Expense Summary if the income contributor is a MEDS person; otherwise the Non Budget Member Income screen is invoked to enter the earned and unearned income and expense details for the income contributor.

Processing

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Non-Budget Member and corresponding Budget Question

Non-Budget Member (Income Contributor)	**Budget Question**	**Budget Type**
2nd Parent (2P)	Q12 – '*Is there a 2nd parent in home for parent-to-child deeming?*	LTC Other (C-Related)
Community Spouse (CS)	Q7 – '*Does the client have a spouse who remains at home?*	LTC
Sponsor Spouse (SS)	Q23 – '*Does the Alien Sponsor have a spouse in the home?*	Other
Ineligible child (C1, C2, C3, C4)	Q11 - *'How many ineligible children in the home?*	LTC Other
Dependent (D1, D2, D3, D4)	Q8 – *'How many Applicant's dependents in home with community spouse?* if there is a community spouse (Q7 = 'Y') Q9 – *'How many applicant's dependents NOT with community spouse?* if there is NO community spouse (Q7 = 'N' or space)	LTC

Technical Note: Currently *Q12* – 1s there a 2nd parent in home for parent-to-child deeming?' *is not used in any of the C-Related templates, even though the second parent's income is used in the MUM's Parent's Income deeming section for some C-Related templates. Q12 will be used in a new version of the C-MNP template, which is being changed for SIR903 (in UAT).*

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Non Budget Member Income (NBMRI)

```
Message Line
      NBMRI                    *** M.E.D. SYSTEM ***                *DATE
      MEBCMIF               NON BUDGET MEMBER INCOME                *TIME
                                                                    *LIBRARY-ID
 *Action                    : _ (A,B,C,D,M,N,L)
 *CASE NUMBER               : _____________ ______________________________
 *MONTH                     : __ / ____ (MM/YYYY)
 *INCOME CONTRIBUTOR        : __

 *Person Num (if exists)    : _____________


     OR

  Name                      : ____________________
  Birth Date                : __ / __ / ____


  Earned Income             : _  ______________
  Unearned Income           : _  ______________

*Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit        PIES
```

This screen gives an overall view of an income contributor's earned and unearned income. The moreables are used to pop up screens to maintain the income details.

Fields

Action (A1)

The action to be taken on the Non Budget Member Income Screen. The valid action codes for this screen are (A)dd, (B)rowse, (C)lear, (D)isplay, (M)odify, (N)ext and (L)ast. This field is mandatory. Help is available for this field.

CASE NUMBER (N13)

The number that identifies the Case. This field is mandatory. The client name will be displayed. Help is available for this field.

MONTH (N6)

The month which the budget information is for. Help is available for this field.

INCOME CONTRIBUTOR (A2)

The type of income contributor this income is for. LDA METICTL defines the valid income contributor types. Help is available for this field.

Person Num (N13)

The person number of this income contributor if the person is defined to MEDS. Optional. Help is available for this field. The name and birth date of the MEDS person will be displayed.

Name (A12)

Name of the income contributor. If the income contributor has a MEDS Person Num this field will be protected. If the income contributor does not have a MEDS Person Num this is free format text used to identify the income contributor. Required for a Non MEDS person.

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Birth Date (MM/DD/YYYY)

Date of birth of the income contributor. If the income contributor has a MEDS Person Num this field will be protected. If the income contributor does not have a MEDS Person Num this date of birth can be used to further identify the income contributor. Optional.

Earned Income

The moreable is used to invoke the Earned Income Pop-Up screen to enter the earned income details for the income contributor. This income is for a case/ month/income contributor for persons without a MEDS Person ID.

Unearned Income

The moreable is used to invoke the Unearned Income Pop-Up screen to enter the unearned income details for the income contributor. This income is for a case/month/income contributor for persons without a MEDS Person ID

PF Keys

PF-Key 6 – PIES

This key will invoke the Person Month Income/Expense Summary screen.

Non Budget Member Income Browse

```
Message Line -
                              *** M.E.D. SYSTEM ***                  *DATE
     MEBCMIB            NON BUDGET MEMBER INCOME BROWSE             *TIME

     Case                  Income
    Number      Month    Contributor      Total Income  Person Num      Name
 ------------- ------- --------------- --------------- ------------- -----------
 _____________ __/____ __ _____________ _______________ _____________ ___________
 _____________ __/____ __ _____________ _______________ _____________ ___________
 _____________ __/____ __ _____________ _______________ _____________ ___________
 _____________ __/____ __ _____________ _______________ _____________ ___________
 _____________ __/____ __ _____________ _______________ _____________ ___________
 _____________ __/____ __ _____________ _______________ _____________ ___________
 _____________ __/____ __ _____________ _______________ _____________ ___________
 _____________ __/____ __ _____________ _______________ _____________ ___________
 _____________ __/____ __ _____________ _______________ _____________ ___________
 _____________ __/____ __ _____________ _______________ _____________ ___________
 _____________ __/____ __ _____________ _______________ _____________ ___________
 _____________ __/____ __ _____________ _______________ _____________ ___________

 Case Num: _____________ Month: __ / ____ Income Contributor: __
 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit              Back  Fwrd
```

Display rows in case number / month / Income contributor order. Latest month first.

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Case Earned Income Pop-Up

```
Message Line
                        *** M.E.D. SYSTEM ***                 *DATE
  MEBCEIN                   EARNED INCOME                     *TIME
                                                              *LIBRARY-ID
  CASE NUMBER        : _____________
  MONTH              : __ / ____
  INCOME CONTRIBUTOR :
  Notes              : ____________________________________________ +

  Employer 1         : ____________________
  Monthly Total      :            0.00      *Frequency      : _
  Hourly Rate        : ______                Hours per Week : ______
       Date           Amount            Date           Amount
   __ / __ / ____  ____________     __ / __ / ____  ____________
   __ / __ / ____  ____________     __ / __ / ____  ____________
   __ / __ / ____  ____________     __ / __ / ____  ____________
   __ / __ / ____  ____________     __ / __ / ____  ____________
   __ / __ / ____  ____________     __ / __ / ____  ____________
  Total Income Entered :
  Self-Employed        : N (Y/N)   Business Expense :
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11
       Help        Cont        Canc        Prev  Next        Clear
```

This screen is used to record a Income Contributor's Earned Income for non budget member contributors who are not defined as persons on MEDS and is used for budgeting purposes. It is just about the same as the Person Earned Income pop-up window but the data is for a Case/Month/Income Contributor not Person/Month.

The differences between Person Earned Income pop-up and Case Earned Income pop up are as follows:

Fields

CASE NUMBER (N13)
: The number and client name of the case. which identifies the Case. Display only.

MONTH (N6)
: The month which the information is for. Display only.

INCOME CONTRIBUTOR (A16)
: The type of income contributor this income is for followed by the name of the income contributor. Display only.

Self-Employment Business Expense Pop-Up
: Moreable is used to pop-up Case Self-Employed Business Expenses Pop-Up instead of Person Self-Employed Business Expenses Pop-Up.

PF Keys

PF Key 3 – Continue
: This will return to the Non Budget member Income screen passing back total for all employers.

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Case Self-Employed Business Expenses Pop-Up

```
Message Line
                        *** M.E.D. SYSTEM ***             *DATE
  MEBCSEN         SELF-EMPLOYED BUSINESS EXPENSES         *TIME
                                                          *LIBRARY-ID
  CASE NUMBER        : _____________
  MONTH              : __ / ____
  INCOME CONTRIBUTOR :
      Date          Amount    *Expense Type & Description
 __ / __ / ____  _____________  __ ______________________________
 __ / __ / ____  _____________  __ ______________________________
 __ / __ / ____  _____________  __ ______________________________
 __ / __ / ____  _____________  __ ______________________________
 __ / __ / ____  _____________  __ ______________________________
 __ / __ / ____  _____________  __ ______________________________
 __ / __ / ____  _____________  __ ______________________________
 __ / __ / ____  _____________  __ ______________________________
 __ / __ / ____  _____________  __ ______________________________
 __ / __ / ____  _____________  __ ______________________________
 __ / __ / ____  _____________  __ ______________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--
       Help        Cont        Canc        Back  Fwrd
```

This screen is used to record an Income Contributor's Self-Employed Business Expense for a non budget member for budgeting purposes. It is very similar to the Person Self-Employed Business Expenses Pop-Up window but the data is for a Case/Month/Income Contributor, not Person/Month.

The differences between Person Self-Employed Business Expenses Pop-Up and Case Self-Employed Business Expenses Pop-Up are as follows:

Fields

CASE NUMBER (N13)
: The number and client name of the case which identifies the Case. Display only.

MONTH (N6)
: The month which the information is for. Display only.

INCOME CONTRIBUTOR (A16)
: The type of income contributor this income is for, followed by the name of the income contributor. Display only.

PF Keys

PF Key 3 – Continue
: This will return to the Case Earned Income screen passing back average monthly self-employed expense for the employer.

Case Unearned Income Pop-Up

```
Message Line …
              *** M.E.D. SYSTEM ***      *DATE
MEBCUIN          UNEARNED INCOME         *TIME

 CASE NUMBER           : ____________ ______________________________
 MONTH                 : __ / ____
 INCOME CONTRIBUTOR    : _________________ ____________________________
 Notes                 : ______________________________________________ +
 Total Unearned Income :

   Mnthly Inc Amt   *Unearned Income Type
 1.  ____________   __  Description
 2.  ____________   __  Description
 3.  ____________   __  Desc
 4.  ____________   __  Desc
 5.  ____________   __  Desc
 6.  ____________   __
 7.  ____________   __
 8.  ____________   __
 9.  ____________   __
 10. ____________   __

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---
      Help        Cont        Canc
```

This screen is used to record a Case Income Contributor's Unearned Income for case contributors who are not defined a person on MEDS, and is used for budgeting purposes. It is just about the same as the Person Unearned Income pop-up window but the data is for a Case/Month/Income Contributor not Person/Month.

The differences between Person Unearned Income pop-up and Case Unearned Income pop up are as follows:

Fields

CASE NUMBER (N13)
The number and client name of the case. which identifies the Case. Display only.

MONTH (N6)
The month which the information is for. Display only.

INCOME CONTRIBUTOR (A16)
The type of income contributor this income is for followed by the name of the income contributor. Display only.

PF Keys

PF Key 3 – Continue
This will return to the Case Budget Month Non IU member Income screen passing back total for all employers.

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Person Month Income/Expense Summary (PIES)

```
     PIES                    *** M.E.D. SYSTEM ***                05/20/08
     MEBIESF          PERSON MONTH INCOME/EXPENSE SUMMARY         09:14:12
                                                                  METEST
*Action                    : _ (A,B,C,D,M,N,P,L)
*PERSON NUMBER             : _____________
*MONTH                     : __ / ____ (MM/YYYY)

 Earned Income                                            : +            0.00
 Unearned Income                                          : +            0.00
 Personal Care Needs Allowance for LTC/ICF/MR             : _____________
 Expenses                                                 : +            0.00
 Medical Expenses Deduction (LTC)                         : +
 Does person have RSDI COLA to disregard?                 : _ (Y/N)
  Was SSI lost due to RSDI cost of living increase only?  : _ (Y/N)
  Was SSI lost due to the receipt of RSDI (not a COLA)?   : _ (Y/N)
  Was SSI lost due to recpt of inc other than Ttl II RSDI? : _ (Y/N)
  What is month/year of first COLA to disregard?          : __ / ____
 Additional Disregard Amount                              : _____________
Copy from  *Person Number  : _____________
           *Month          : __ / ____
*Tran: _______ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Main  Retn  Quit  Csum                    BMbr  BSec        Pers
```

This screen gives an overall view of a person's earned income, unearned income, medical expenses deduction (LTC) and other expenses. The moreables are used to pop up screens to maintain the income and expense details.

Fields

Action (A1)

The action to be taken on the Person Month Income/Expense Summary Screen. The valid action codes for this screen are (A)dd, (B)rowse, (C)lear, (D)isplay, (M)odify, (N)ext and (L)ast. This field is mandatory. Help is available for this field.

PERSON NUMBER (N13)

The number which identifies the Person. This field is mandatory. The person name will be displayed. Help is available for this field.

MONTH (N6)

The month which the budget information is for.

Earned Income (N11.2)

Total earned income for the person. The moreable is used to invoke the Person Earned Income Pop-Up screen to enter the earned income details for the person

Unearned Income (N11.2)

Total unearned income for the person. The moreable is used to invoke the Person Unearned Income Pop-Up screen to enter the unearned income details for the person

Personal Care Needs Allowance for LTC/ICF/MR (N9.2)

This answer is stored in field ANSWER-Q20. Text of this question on the screen must correspond to Q20 in LDA for Budget Info Questions. Default is $38 and valid values are $38 and $128..

Expenses (N11.2)
Total expenses for the person excluding medical expenses deduction. The moreable is used to invoke the Person Monthly Expenses screen to enter the expenses details for the person.

Medical Expenses Deduction (LTC) (N11.2)
Total medical expenses deduction for the person. The moreable is used to invoke the Medical Expenses screen to enter the medical expenses deduction details for the person

Does person have RSDI COLA to disregard (A1)
This answer is stored in field ANSWER-Q17. Text of this question on the screen must correspond to Q17 in LDA for Budget Info Questions. Valid values are (Y)es and (N)o.

Was SSI lost due to RSDI cost of living increase (A1)
This answer is stored in field ANSWER-Q13. Text of this question on the screen must correspond to Q13 in LDA for Budget Info Questions. Valid values are (Y)es and (N)o.

Was SSI lost due to receipt of RSDI (not a COLA)? (A1)
This answer is stored in field ANSWER-Q28. Text of this question on the screen must correspond to Q28 in LDA for Budget Info Questions. Valid values are (Y)es and (N)o.

Was SSI lost due to recpt of inc other than Ttl II RSDI? (A1)
This answer is stored in field ANSWER-Q29. Text of this question on the screen must correspond to Q29 in LDA for Budget Info Questions. Valid values are (Y)es and (N)o.

What is month/year of first COLA to disregard? (N6)
This answer is stored in field ANSWER-Q16. Text of this question on the screen must correspond to Q16 in LDA for Budget Info Questions. Format: MM/YYYY. Must be a valid month/year and may not be in the future and must be entered if answer to '*Does person have RSDI to disregard?* is (Y)es.

Additional disregard amount (N9.2)
This answer is stored in field ANSWER-Q18. Text of this question on the screen must correspond to Q18 in LDA for Budget Info Questions.

Copy From
The worker will be able to copy Person Income Expense Data from another person and/or month. The worker will then be able to change any amounts which are different.

Copy From Person Number (N13)
The person number which the copy from person income expense data is attached. This field is mandatory if the Copy From Month is entered. This field is only available if the action is Add. Default to person number from above if available.

Copy From Month (N6)
The month of the copy from person income expense data. This field is only available if the action is Add. Default to month from above if available.

Processing

Add Processing

On an add if the worker has specified copy fields then copy the data from the person/ month specified into the new record being added. This includes all income and expense details for the person.

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PF Keys

PF Key 5 – CSUM

This key will point to the Case Summary Inquiry Screen

PF Key 9 -BMbr

This key will point to the Budget Member Maintenance function.

PF Key 10 - BSec

This key will point to the Budget Section Maintenance screen.

PF Key 11 - Next

The user will have indicated on the Budget Member screen which members have income and/or expenses. If there are any more income or expenses to be input this key will point to the Income/Expense summary screen for the next budget member with income or expense to input. If all income and expenses have been added then this key will point to Budget Questions Depending on the category/type-case the LTC/Waiver, C-Related or Other budget questions will be displayed. For MPP Budgets (type case 88) if earnings are being budgeted, check if hours worked have been entered before showing the next screen. Give the error message *'Hours are mandatory for MPP type case – see employer *'* (the * indicates employer number).

PF Key 12 - Pers

This key will point to the Person Maintenance screen.

Person Monthly Income/Expense Browse

```
Message Line _
                              *** M.E.D. SYSTEM ***                  *DATE
     MEBPMIB          PERSON MONTHLY INCOME/EXPENSE BROWSE          *TIME


    Person                  Total         Total     Tot Medical
    Number      Month       Income       Expenses   Expenses Ded      Name
 ------------- ------- -------------- ------------ ------------ ----------------
_____________ __/____ _____________ ____________ ____________ _________________
_____________ __/____ _____________ ____________ ____________ _________________
_____________ __/____ _____________ ____________ ____________ _________________
_____________ __/____ _____________ ____________ ____________ _________________
_____________ __/____ _____________ ____________ ____________ _________________
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_____________ __/____ _____________ ____________ ____________ _________________
_____________ __/____ _____________ ____________ ____________ _________________
_____________ __/____ _____________ ____________ ____________ _________________
_____________ __/____ _____________ ____________ ____________ _________________
 Pers Num: _____________  Month: MM / YYYY
 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit              Back  Fwrd
```

Display rows in person number / month order. Latest month first.

Person Earned Income Pop-Up

```
Message Line -
                        *** M.E.D. SYSTEM ***                *DATE
MEBPEIN                     EARNED INCOME                    *TIME
          (Missing Data Message)                             *LIBRARY-ID
PERSON :  _____________ Client Name
MONTH  :  __ / ____
Notes  :  ____________________________________________ +

Employer 1    : ____________________     Student Earnings : _ (Y/N)
Monthly Total :            0.00   0.00  *Frequency        : _
Hourly Rate   : ______                    Hours per Week   : ______
                           Taxes & Hrs                           Taxes & Hrs
    Date          Amount    for MPP      Date          Amount    for MPP
__ / __ / ____ _____________    +     __ / __ / ____ _____________    +
__ / __ / ____ _____________    +     __ / __ / ____ _____________    +
__ / __ / ____ _____________    +     __ / __ / ____ _____________    +
__ / __ / ____ _____________    +     __ / __ / ____ _____________    +
__ / __ / ____ _____________    +     __ / __ / ____ _____________    +
Total Income Entered :           0.00
Self-Employed        : N (Y/N)   Business Expense :
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--
      Help        Cont        Canc        Prev  Next        Clear
```

This screen is used to record a Person's Earned Income for budgeting purposes. It is similar to the Earned Income Amount Frequency pop-up Window which already exists. A few new fields added, a bit more validation and the data belongs to Person/Month not Budget Worksheet line.

Fields

Missing Amount Confirmation (A1)

A confirmation from the worker that the worker is aware of the missing amounts and whether it is okay to have missing amounts. Valid values: (Y)es, (N)o. This field is *hidden* unless the number of amounts entered is less than the number of amounts required by frequency, as indicated in the frequency table. The system should also display an *error message* if the number of amounts entered is less than the number required by frequency. The amount window will remain open until the correct number of amounts are entered OR until the value of this field is (Y)es. The worker will be able to add a note about the missing amounts. .

Technical Note: This field is not stored on the database. It is an indicator used by the system only during online processing

PERSON

The number which identifies the Person, followed by the person name. Display only.

MONTH

The month which this information is for. Display only.

Notes (5 * A45)

Free format notes will be entered by the worker. This is an optional 'moreable' field.

Employer (A20)

The name of the employer. Optional if self employed. This field is mandatory if not self-employed and any income amounts are entered.

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Student Earnings (A1)

Indicates if this income is student earnings. Valid Values: (Y)es (student earnings), (N)o (not student earnings). The default is (N)o.

Monthly Total (N11.2 & N4.2)

The averaged total for the employer of the incomes below according to the table below minus the averaged total self-employed expenses. The averaged monthly hours worked for the employer according to the frequency conversion table below. Amounts are rounded to the nearest whole dollar amount when the income is pulled into the budget (only for C-Related budgets). Hours are rounded to two decimals. Display only.

Frequency (A1)

The frequency of the income from the employer. The valid values are described in the table below. The frequency entered must be a valid frequency code. This field is mandatory if the corresponding date is entered.

Hourly Rate (N3.2)

The hourly rate the person will get from the employer. The hourly rate is required if the frequency is (H)ourly and may not be entered for any of the other frequencies. The weekly amount will be calculated as hourly rate multiplied by hours per week.

Hours per Week (N3.2)

The hours per week the person is scheduled to work for the employer. The hours per week is required if the frequency is (H)ourly and may not be entered for any of the other frequencies. The weekly amount will be calculated as hourly rate multiplied by hours per week.

Dates (N8)

The date of the income amount from the employer. The date entered must be a valid date. Only one date can be entered if the frequency is (H)ourly.

Amounts (N9.2)

The income amount from the employer. This field is mandatory if the corresponding date is entered. If the frequency is (H)ourly, the amount will be calculated as hourly rate multiplied by hours per week.

Taxes & Hrs for MPP (A1)

Moreable is used to pop-up Hours Worked and Taxes Withheld (for MPP Reporting) Pop-up (page 31). This pop-up can only be invoked if the corresponding income date has been entered.

Total income entered (N11.2)

Total amount of income for this employer. Display only.

Self-Employed (A1)

Indicates if this income is for self-employment. Valid Values: (Y)es (self-employment income), (N)o (not self-employment income). The default is (N)o.

Business Expense (N9.2)

Moreable is used to pop-up Person Self-Employed Business Expenses Pop-Up. Cannot be used if Self-Employed indicator is (N)o.

Total amount of the self-employed business expenses. This is the amount to be subtracted from self-employment income to get net self-employment income. Self-employment income can be entered as net in which case self-employment business expenses are not input and this field would be zero.

Processing

The income amounts and hours worked will be entered for each employer according to the frequency of the income from that employer. The system will cater for the following frequencies:

1. Yearly
2. Weekly
3. Biweekly (every other week)
4. Semi monthly (twice a month)
5. Monthly
6. Actual
7. Hourly

The total amount will be calculated in each employer window. Both the captured and the calculated amounts will be recorded in the system. The total hours worked will be calculated in each employer window and will be converted to a monthly total using he conversion rules. The converted monthly hours will be rounded to 2 decimals and NOT to the nearest full hour. The total calculated monthly hours worked for all employers will be recorded in the system for MPP reporting purposes.

The conversion rules are represented in the following frequency table:

Code	Frequency of Income	Conversion Rule	Number Required
Y	Yearly	Divide yearly income by 12	1
W	Weekly	Multiply weekly income by 4.0 Average income for last 4 periods	Multiple of 4
B	Biweekly	Multiply biweekly income by 2.0 Average income for last 2 periods	Multiple of 2
S	Semi Monthly	Add amounts Average income for last 2 periods	Multiple of 2
M	Monthly	Average income for last 1 period	Multiple of 1
A	Actual	Actual income for the calc period	Any number
H	Hourly	Hourly rate * hours per week to get a weekly income which will then be converted to a monthly amount using the conversion rule for weekly frequency	

Rounding rules.

1. When calculating gross monthly earned income, round to the nearest dollar after each calculation. Round down when amount equals 49c or less. Round up when amount equals 50c or more. This rounding will occur when the income is pulled into the budget (only for C-related budgets)
2. Do not round until after conversion for weekly, biweekly and semi-monthly earnings.

PF Keys

PF Key 3 – Continue

This will return to the Income/Expense screen passing back total for all employers.

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PF Key 5 – Cancel
This will return to the Income/Expense screen rejecting any changes made.

PF Key 7 - Previous
This key will point to the Earned Income window for the last employer.

PF Key 8 - Next
This key will point to the Earned Income window for the next employer.

PF Key 10 – Clear
This will clear all the fields on the screen.

Hours Worked and Taxes Withheld (for MPP Reporting) Pop-up

```
Message Line -
                        *** M.E.D. SYSTEM ***            *DATE
  MEBHTXN       HOURS WORKED AND TAXES WITHHELD          *TIME
                        (FOR MPP REPORTING)              *LIBRARY-ID

  PERSON        : _____________
  MONTH         : __ / ____
  Income Date   : __ / __ / ____
  Income Amount : ____________

  Hours Worked  : _______
   Tax Amount    Tax Type & Description
   ____________  01 FICA___________________________
   ____________  02 Federal________________________
   ____________  03 State__________________________
   ____________  04 Medicare_______________________

 Copy From *Income Date : __ / __ / ____
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10-
       Help        Cont        Canc                          Clear
```

This screen is used to record the hours worked for an employer and the taxes withheld by the employer and is obtained from the check stub. The hours worked are mandatory for type case 88 if earnings are being budgeted, are only used for MPP reporting and are not included in the budget calculation. If the type case for the budget is a 04/88 (MPP), and earned income has been entered, at least one tax amount of at least $0 must be entered. If the worker exists this pop-up without entering anything, this message will be displayed.

Field Descriptions

PERSON (N13)
The number that identifies the Person, followed by the person name. Display only.

MONTH (N6)
The month, which this information is for. Display only.

Income Date (N8)
The date of the income amount from the employer. Display only.

Income Amount (N9.2)
The income amount from the employer. Display only.

Hours Worked (N4.2)

The hours worked for the employer. This field can be left blank. Hours worked is mandatory if a tax amount is entered.

Technical Note: The hours worked is mandatory for type case 88 if earnings are being budgeted. This edit cannot be performed when the Earned Income is entered since we don't know what the type case of the Certification is going to be. This edit will be performed when the MPP budget (type case 88) is being calculated and the analyst presses PF11 – Next on PIES to go to the next screen.

Technical Note 2: The worker must enter at least one amount of at least $0 on the tax amount lines. If they do not, an error will be shown. These tax amounts are numeric, but Natural cannot tell the difference between 0 because a worker entered one, or 0 because there is nothing there. To remedy this problem, logical were added to the ME-PROVIDER file. They will be set to TRUE if any amount is entered on a line. In order not to confuse the worker, two maps are now being used. If the worker has entered nothing (all tax amount lines have nothing in them), the ZP option is off to hide the zeros. Once the worker enters any amount on any line, the map is switched to an identical one with the ZP option on to show the zeros.

Tax Amount (N9.2)

The tax amount withheld by the employer. This field can be left blank.

Tax Type & Description (A2 & A30)

The valid tax types and descriptions will be displayed. Valid values are:

Code	Short Description
01	Social Security
02	Federal
03	State
04	Medicare

Copy From Income Date (N8)

The income date which the copy from hours worked and taxes withheld are attached. Default to income date from above if available and if a different income date is entered; the hours worked and taxes withheld will be copied from the entered income date to the income date above.

Processing

All four tax types and their descriptions will be displayed on the pop-up when it is invoked and the Analyst only has to enter the tax amount for the corresponding tax type. If taxes have previously been entered, all the tax types and descriptions will be displayed with the entered tax amounts. The analyst can change existing tax amounts or may enter new tax amounts for tax amounts previously left blank.

PF Keys

PF Key 1 – Help

Help is only available on the Copy From Income Date field. The following help will be displayed and the analyst can select any income date to copy the hours and taxes from.

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```
Position cursor or enter a valid Income Date
                    *** M.E.D. SYSTEM ***           *DATE
  MEBHTXN     HOURS WORKED AND TAXES WITHHELD       *TIME
                                                    *LIBRARY-ID
       Income          Income
        Date           Amount       Hours
      ----------    ------------   -------
      __/__/____    _____________  _______
      __/__/____    _____________  _______
      __/__/____    _____________  _______
      __/__/____    _____________  _______
      __/__/____    _____________  _______
      __/__/____    _____________  _______
      __/__/____    _____________  _______
      __/__/____    _____________  _______
      __/__/____    _____________  _______
      __/__/____    _____________  _______
 Income Date :  __ / __ / ____
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF1
       Help        Retn
```

PF Key 3 – Continue

This will return to the Earned Income pop-up.

PF Key 5 – Cancel

This will return to the Earned Income pop-up rejecting any changes made.

PF Key 10 – Clear

This will clear the hours worked and tax amounts entered on the screen.

Person Self-Employed Business Expenses Pop-Up

```
Message Line
                    *** M.E.D. SYSTEM ***           *DATE
  MEBPSEN        SELF-EMPLOYED BUSINESS EXPENSES     *TIME
                                                     *LIBRARY-ID
  PERSON :  _____________
  MONTH  :  __ / ____
      Date          Amount    *Expense Type & Description
 __ / __ / ____  _________.__  __ ______________________________
 __ / __ / ____  _________.__  __ ______________________________
 __ / __ / ____  _________.__  __ ______________________________
 __ / __ / ____  _________.__  __ ______________________________
 __ / __ / ____  _________.__  __ ______________________________
 __ / __ / ____  _________.__  __ ______________________________
 __ / __ / ____  _________.__  __ ______________________________
 __ / __ / ____  _________.__  __ ______________________________
 __ / __ / ____  _________.__  __ ______________________________
 __ / __ / ____  _________.__  __ ______________________________
 __ / __ / ____  _________.__  __ ______________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF1
       Help        Cont        Canc        Back  Fwrd
```

This screen is used to record a Person's Self-Employed Business Expense for budgeting purposes.

Fields

PERSON

The number which identifies the Person, followed by the person name. Display only.

MONTH
The month which this information is for. Display only.

Date (N8)
Date of the business expense. Must be a valid date.

Amount (N9.2)
Amount of the business expense. Mandatory if corresponding date is entered.

Expense Type (A2)
Expense Type code. Entered code must be a valid expense type. Help is available for this field. For help use Expense Type table and display self-employed business expense type codes only.

Description (A30)
If an expense type of 99 – Other Self-employed Business expense is entered, the description can be overwritten; otherwise the description from the Expense Type Table is displayed.

Processing

Just as income has to be calculated to be a monthly amount so does self-employed business expense. The self-employed expenses must be input for the same period as the self-employed income as the number of months income will be used to convert self-employed expenses to an average monthly expense. For example: if the income input was for 2 months then 2 months worth of expenses must be added, if the income input was for a year then a years worth of expenses must be added.

Programmer note: we already calculate how many months the income represents, we just use a temp field for the value. See MEBAMTN where it is calculating required number of income amounts entered for each different frequency.

PF Keys

PF Key 3 – Continue
This will return to the Earned Income screen passing back average monthly self-employed expense for the employer.

PF Key 5 – Cancel
This will return to the Earned Income screen rejecting any changes made.

PF Key 7 - Previous
This key will point to the previous 12 expenses for this employer.

PF Key 8 - Next
This key will point to the next 12 business expenses for this employer.

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Person Unearned Income Pop-Up

```
Message Line
                    *** M.E.D. SYSTEM ***           *DATE
  MEBPUIN              UNEARNED INCOME              *TIME
                                                    *LIBRARY-ID
  PERSON :  _____________
  MONTH  :  __ / ____
  Notes  :  ____________________________________________ +
  Total Unearned Income :
     Mnthly Inc Amt   *Unearned Income Type
   1.  ___________     __ Description
   2.  ___________     __ Description
   3.  ____________    __
   4.  ____________    __
   5.  ____________    __
   6.  ____________    __
   7.  ____________    __
   8.  ____________    __
   9.  ____________    __
  10.  ____________    __
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---
       Help        Cont        Canc
```

This screen is used to record a Person's Unearned Income for budgeting purposes. It is similar to the Income Types pop-up Window which already exists but now only unearned income is input here, not earned income. A few new fields added, a bit more validation and the data belongs to Person/Month not Budget Worksheet line.

Fields

PERSON
The number which identifies the Person followed by the person name. Display only.

MONTH
The month which this information is for. Display only.

Notes (5 * A45)
Free format notes will be entered by the worker. This is an optional 'moreable' field.

Total Unearned Income (N11.2)
Display only. Sum of all unearned amounts for this person.

Monthly Income Amount (N9.2)
Monthly amount of the Unearned Income.

Unearned Income Type (A2)
Unearned Income Type code. Entered code must be a valid unearned income type. Help is available for this field. For help use Income Type table and display unearned income codes only.

Description
The description of the Income Type. The system will display the description in a display-only field.

Person Monthly Expenses

```
Message Line
                          *** M.E.D. SYSTEM ***                    *DATE
      MEBPMEN      PERSON MONTHLY EXPENSES MAINTENANCE             *TIME
                                                                   *LIBRARY-ID
 *Action        :   _ (D,M)
  PERSON NUMBER :   _____________
  MONTH         :   __ / ____ (MM/YYYY)
  Total Expenses:           0.00                                 Depndt Exp
 *Cmd   Amount     *Expense Type                 Text            Care  Notes
   _  ____________  __                      ____________________   _     _
   _  ____________  __                      ____________________   _     _
   _  ____________  __                      ____________________   _     _
   _  ____________  __                      ____________________   _     _
   _  ____________  __                      ____________________   _     _
   _  ____________  __                      ____________________   _     _
   _  ____________  __                      ____________________   _     _
   _  ____________  __                      ____________________   _     _
   _  ____________  __                      ____________________   _     _
   _  ____________  __                      ____________________   _     _

 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF1
       Help        Retn                    Back  Fwrd
```

This screen is used to record a Person's monthly expenses (excluding Medical Expenses Deduction) for budgeting purposes.

Fields

Action (A1)
: The action to be taken on the Person Monthly Expense Screen. The valid action codes for this screen are (C)lear, (D)isplay, (M)odify, and (N)ext. This field is mandatory. Help is available for this field.

PERSON NUMBER (N13)
: The number which identifies the Person. This field is mandatory. The person name will be displayed.

MONTH (N6)
: The month which the expense information is for.

Total Expenses (11.2)
: Sum of all expense amounts (excluding medical expenses deduction) for this person/month.

Command (A1)
: The action to be taken on the line. This field is optional. Valid commands are (A)dd, (M)odify. (P)urge.

Amount (N9.2)
: Amount of the expense.

Expense Type Code (A2)
: Expense Type code. Entered codes must be one of the valid expense types (as defined on the Expense Type Maintenance screen EXPTYP) but does not include Medical Expense Deduction Codes. Help is available for this field.

Description
: The description of the Expense Type. The system will display the description in a display-only field.

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Text (A20)
Additional Free Format text to further describe the expense. e.g. Blue Cross on an expense type of Health Insurance. The Dependent Care Provider can be entered in the text field and it will be available on the Dependent Care pop-up for further modification.

Dependent Care (A1)
If this is a dependent care expense (as defined on the Expense Type Maintenance screen EXPTYP) this moreable must be used to pop-up the Dependent Care Info pop-up to enter dependent care information for this expense. Required if this is a Dependent Care Expense.

Notes (5 * A45)
Free format notes will be entered by the worker. This is an optional 'moreable' field.

Processing

Display lines in Expense Type Code Order

Do not include medical expenses deduction when displaying lines.

Dependent Care Info Pop-Up

```
Message Line
                    *** M.E.D. SYSTEM ***            *DATE
  MEBPMEN2       DEPENDENT CARE EXPENSE INFO         *TIME

  Dependent Care Provider: ______________________________

      *Person      Name                            Birth Date
    _____________
    _____________
    _____________
    _____________
    _____________
    _____________
    _____________
    _____________
    _____________
    _____________

  Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF1
        Help        Cont        Canc
```

This screen is used to input the Dependent Care Provider and Dependent(s) (i.e. Child(ren) or other dependents) information for a single Dependent Care expense. This information is used to calculate the dependent's (child's) age for determining the correct dependent care deduction.

Fields

Dependent Care Provider (A20)
Free format text describing the Dependent Care Provider this expense was for. The provider will be saved in the Text field and will be available on the Expense Maintenance screen for modification.

Person (N13)
Person Number of the dependent the dependent care expense was for. The dependent Person must appear in the same case as the main Person (from Person Month). As there can be more than one dependent for each dependent expense line the user is allowed to input up to a maximum of 10 dependents. At least 1 dependent must be entered. Help is available on this field, which gives all other case members in the cases where the Person this expense is for (from Person Month) is found.

Name (A20)
Person Name. Display only.

Birth Date (N8)
Birth Date. Display only.

Medical Expenses Deduction (LTC)

```
Message Line
                          *** M.E.D. SYSTEM ***                    *DATE
      MEBIMEN    MEDICAL EXPENSES DEDUCTION (LTC) MAINTENANCE      *TIME
                                                                   *LIBRARY-ID
 *Action        :   _ (D,M)
  PERSON NUMBER :   _____________
  MONTH         :   __ / ____ (MM/YYYY)
  Total Expenses:           0.00
 *Cmd   Amount     *Expense Type                  Text              Notes
   _  _____________  __                       ____________________      _
   _  _____________  __                       ____________________      _
   _  _____________  __                       ____________________      _
   _  _____________  __                       ____________________      _
   _  _____________  __                       ____________________      _
   _  _____________  __                       ____________________      _
   _  _____________  __                       ____________________      _
   _  _____________  __                       ____________________      _
   _  _____________  __                       ____________________      _
   _  _____________  __                       ____________________      _

 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF1
       Help        Retn                    Back  Fwrd
```

This screen is used to record a Person's LTC Medical Expenses Deduction for budgeting purposes.

The functionality is exactly the same as Person Monthly Expenses except:

1. Display and allow input of Medical Expenses Deduction (as defined on the Expense Type Maintenance screen EXPTYP) only.
2. There is no Dependent Care column.

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Budget Worksheet Subsystem

An eligibility determination must exist before a budget can be added to it. The eligibility determination must be in an 'open' or 'in progress' state.

There will be two ways of processing a budget:

1. The budget and its components will be captured individually, or
2. The system will assist the worker to capture the budget and its components by offering the NEXT option to pass through the various components in a specific order (thus ensuring all components are added before the calculation is made).

For the latter method, the NEXT option will be provided in the form of a function key. The capture steps will be:

1. Add a budget worksheet
2. Identify the potential AU members and indicate the income unit members
3. Capture the IU member sections and/or other compulsory sections (e.g. Spenddown, Extended Medicaid)
4. Calculate the budget and confirm the decision

The final stage of the budget worksheet - the calculation process - will perform various checks before proceeding with the calculation. For example, the version of the template is either the current version or a valid replaced version, there are proposed AU members and there are IU members who have been allocated income sections.

The worker will be given a chance to confirm the budget's determination, i.e. eligibility or ineligibility. Once the budget has been confirmed, a reminder will be sent via Workflow, to the worker's supervisor to check the budget. Budgets can be checked for new or inexperienced workers at the supervisor's discretion. The system also allows for budget checking by type case. (See Type Case Mtnc.) Once all budgets for the assistance unit have been checked, the decision will be certified (See Eligibility Determination Maintenance). The certification process will only see those budgets that have been checked. The certification process will check that there are no other outstanding budgets for the decision.

After the confirmation of one budget another budget could be added for the same case. The system will take the worker to the Budget Worksheet Maintenance function.

Budget Worksheet Maintenance

```
Message line…
      BDGT                    *** M.E.D. SYSTEM ***                05/19/08
      MEBWRKF             BUDGET WORKSHEET MAINTENANCE             13:12:18
                                                                   METEST
 *Action                  : _ (A,B,C,D,M,N,P,L)
 *CASE NUMBER             : _____________
 *DETERMINATION NUMBER    : ____
 *BUDGET NUMBER           : ___              Linked to Cert:
 *Status                  : _                Deter Outcome :
 *Type Case               : ___ ___                Version:
  Budget Date             : __ / ____ (MM/YYYY)    Location:
  Calculation Period      :                Number of Months: _ (1/2/3)
  Calculation Period From : __ / __ / ____   Calc Period To: __ / __ / ____
  Notes                   : ____________________________________________ +
  Include EIE             : _ (Y/N) (C & LTC only)

 Copy from
 *Determination Number    : ____             Worker Loc Type: P
 *Budget Number           : ___              Worker Loc Id  : 0001
  Section Selection       : N (Y/N)          Worker Number  : 0002

 *Tran: _______ Act: _ Key: ____________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit  Elig  BMbr  Csum  Unlnk BSec  BCal  Next  Vrsn
```

This budget worksheet details describe how the budget will be captured, i.e. the template that will be used, the calculation rules that will be applied etc. This is the first step in creating a budget.

Fields

Action (A1)

The action codes for this field are (A)dd, (B)rowse, (C)lear, (D)isplay, (M)odify, (N)ext, (P)urge, (L)ast.

CASE NUMBER (N13)

The number that identifies the Case. This field is mandatory. The client name will be displayed. The name will be displayed in the standard format. The client name will be the concatenation of the first 2 clients - the probable clients will be used if the decision is for an application.

DETERMINATION NUMBER (N4)

The number that identifies the Eligibility Determination for which the budgets will be calculated. This field is mandatory.

BUDGET NUMBER (N3)

The number that identifies the budget for an Eligibility determination. This field is mandatory except for an Add action when the system will generate this number.

Technical Note: The number will be generated using the next number method.

Linked to Cert (N4, N4, N4)

Identifies up to three Certification Periods (for this Case Number and Determination Number) that have been linked to this budget. This field is display only.

Technical Note: Budgets are linked to Certification Periods in the ELIG (Eligibility Determination Maintenance) transaction.

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Status (A1)

The status of the budget. This is a mandatory field. Default is I - in progress. The worker can only change the status to 'in progress'. The system will change the status to 'waiting' or 'complete' when the eligibility section is completed. Valid values are:

I	'in progress'	Budget is added/modified
W	'Waiting – waiting to be checked'	Budget determination is confirmed and worker requires checking
C	'complete - waiting to be decided'	Budget determination is confirmed/checked

To complete a budget in the Waiting status, refer to Budget Checking Process (Transaction BCHK) to approve budgets.

Determination Outcome (A15)

The outcome of the budget determination will be displayed. This may be blank if the budget has not been calculated. Valid values are:

- 'ELIGIBLE'
- 'INELIGIBLE'
- '12 MOS CONT ELIG'
- Blank

Type Case

The category (N3) and type case (N3) for which this budget will be calculated. This field is mandatory. This field cannot be modified. The description of the category type case will be displayed. The template and version to be used will be displayed. The system will use the Category Type Case and Budget Date to determine which Template Version is in effect at the Budget Date.

Version (A10)

The template id (A6) and version (A4) for this budget. This field is display only.

Location (A6)

The urban or rural indicator for the location associated with the case. This field is display only.

Budget Date (N6)

The date for which the budget is done. This is a mandatory field. The format is MMYYYY. The date entered must be a valid date. The system can always assume that it is the first day of the month.

Calculation Period (A1)

The frequency that will be used to calculate the amounts on the budget. The value will be set to the frequency from the template. This is an output only field. Valid values are:

M monthly

Q quarterly

Number of Months (N1)

The number of months in the calculation period. The worker will enter this value if the calculation frequency is Quarterly. If the calculation frequency is Monthly, the value will be set to '1' and the worker will not be allowed to change it For TM templates the value will be set to '3'. Valid values are 1,2 or 3.

Calculation Period From (N8)

The start date of the calculation period. This is a mandatory field if the Calculation Period is Quarterly. For Type Cases 20 and 21 (Medically Needy Person, Quarterly Budget required): This date will be calculated as the first day of the Budget Month. Once calculated and saved the field will be protected, and may only be modified by changing the Budget Month.

Calculation Period To (N8)

The end date of the calculation period. This is a mandatory field if the Calculation Period is Quarterly. For Type Cases 20 and 21 (Medically Needy Person, Quarterly Budget Required): This date will be calculated as the last calendar day of the month for (Budget Month + Number of Months – 1). Once calculated and saved the field will be protected, and may only be modified by changing the Budget Month and/or Number of Months

Notes (5 * A45)

Free format notes will be entered by the worker. This is an optional 'moreable' field.

Include EIE (Earned Income Exemption) indicator (A1)

An indicator to tell the system whether or not to calculate the EIE fields in the budget. This field only applies to LTC and C-related budgets. Valid values are: (Y)es, (N)o, blank. Default value is (Y)es for LTC budgets and (N)o for all other budgets.

Technical Note: This means that whenever the NM or NT operators are encountered or if the Dependent on EIE indicator is (Y)es on a line the system should check the value of the EIE indicator. If (Y)es then the line should be calculated else the value of the line should be set to zero. This field acts as an override for EIE eligibility; even if the applicant meets all other requirements for EIE, the worker can still deny the EIE by setting this indicator to (N)o.

Copy from

The worker will be able to copy the section values of another budget into the one being processed. This option will only be available on an Add action. The budget being copied can be another budget for the same determination (e.g. one in error) or it can be a budget from another determination. If the templates and versions are the same and the 'Copy from' budget section is not a Member Calculation section only the budget section values are copied. However, if the templates and versions are the same and the 'Copy from' budget section is a Member Calculation section, this section will be added along with values from the 'Copy from' budget. If the 'Copy from' budget has members that have no Member Calculation sections then these members will be copied automatically. This will allow the user the ability to decide on the budget member maintenance screen which members are still required for the new budget.

If the templates or versions are not the same on the 'Copy from' and 'Copy to' budgets copy all budget members to the new budget. If they are Income Unit Member create the corresponding budget section using the appropriate Member Calculation section from the 'Copy to' budgets template. If there are more than 1 Member Calculation sections on the 'Copy to' budget prompt the user to select the section to use.

Initial Budget Questions (Case Budget Info):

If the Case Budget Info record for the budget month already exists then do nothing.

If the Case Budget Info record for the budget month does not exist then copy Initial Budget Questions and Non Budget Member Income from old Initial Budget Questions and Non Budget Member Income to create new Initial Budget Questions Non Budget Member Income records for the budget month. For quarterly Budgets, copy the latest, i.e. the last month using the number of months on the budget, Initial Budget Questions and Non Budget Member Income (no income is copied for non budget members).

Budget Members

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If a Person Monthly Income record already exists for this person and month do nothing.

If a Person Monthly Income record does not exist for this person and month then copy all data (including all earned income, unearned income, expenses for person) from old Person Monthly Income and Expense records if there is one and create new Person Monthly Income and Expense records for the person/budget month. For quarterly budgets NO income or expenses will be copied. Blank Income (PIES) records will be created for every budget member with income for every month.

Copy from Determination number (N4)
: The determination number to which the copy from budget is attached. This field is mandatory if the Copy from budget number is entered. This field is only available if the action is Add.

Copy from Budget number (N3)
: The budget number of the budget to be copied. This is a mandatory field if the Copy from Determination number is entered. This field is only available if the action is Add. .

Copy from Section Selection (A1)
: An indicator to say whether the section selection list must be displayed. Valid values are (Y)es and (N)o. Default value is (N)o. If (N)o is entered then all the sections in the original budget will be copied as well as budget members who have no sections. If (Y)es is entered then the following pop-up window will be displayed :

```
                                                *DATE
 MEBCPYN      SECTION SELECTION LIST             *TIME

 Sel  Section ID    Member Name
 ---  ------------  ------------------------------
  _
  _
  _
  _



Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8-
      Help        Cont        Canc        Back  Fwrd
```

The Section Selection pop-up window lists all of the sections in the budget to be copied.

Fields

Selection (A1)
: The indicator to say whether to copy the section. This is an optional field. Valid values are ‘X’,’S’ and blank.

Section Id (A13)
: The section id. Display only field.

Member Name (A30)
: The name of the Person associated with the section (if appropriate). Display only field.

Additional PF Keys

PF Key 5 - Elig
: This key will point to the Eligibility Determination Maintenance screen.

PF Key 6 - BMbr
This key will point to the Budget Member Maintenance screen.

PF Key 7 – CSUM
This key will point to the Case Summary Inquiry screen.

PF Key 8 - Unlnk
This key will point to the Budget Linked to Cert Maintenance screen.

PF Key 9 - BSec
This key will point to the Budget Section Capture screen.

PF Key 10 - BCal
This key will point to the Eligibility Section Maintenance screen.

PF Key 11 - Next
This key will point to the next function in the Budget Calculation process - Budget Member Maintenance.

PF Key 12 - Vrsn
This key will point to the Template Version Notes information screen.

Add Processing

The Add process will create the Budget Worksheet and the mandatory Budget Sections as defined in the Template version. All sections except for CM sections will be created from the template. Also, if the template has a spenddown section but the type case does not require a spenddown section, a spenddown section will not be created. A Case Budget Info record (Initial Budget Questions) will also be created if one doesn't already exist for the Case/Budget Month.

Change this processing for Pretest section for 185% pretest for students with income as follows.

If the pretest section template has Student Pretest Indicator set to Y then only add a pretest section for this budget if the answer to case question '*Is there a LIFC child who is a student with Earned Income?*' is equal to Y.

Technical Note: The Pretest section will be created when the budget is added and then depending on the answer to question ' Is there a LIFC child who is a student with Earned Income?' the section will be deleted if answer is (N)o or created if answer (Y)es and the section does not already exist.

Technical Note: Call common routine 'Create Mandatory Sections from Template'.

Modify Processing

The budget can only be modified if the status is 'in progress'. The worker can make changes to the budget after the budget has been completed, but must first change the status to 'in progress'.

The Budget cannot be modified if the Eligibility Determination that the budget is linked to has been Completed OR the budget has been used.

The Budget cannot be modified if the Eligibility Determination is ineligible and the application has been rejected.

Technical Note: Determine if the budget has been used by checking the Budget worksheet/CPTC entity.

Technical Note: The Worker number and Supervisor user id of the current user must be stamped on the budget whenever an addition or modification is made.

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Purge Processing

Any Budget that is marked as 'in error' can be purged..

A Budget cannot be purged if:

- The Eligibility Determination has been completed; or
- The Budget has been used.

When a Budget Worksheet is purged all of it's Sections and Lines will also be purged. When purging a Budget, do **not** purge the Initial Budget Questions (Case Budget Info record) or any Person Monthly Income or Expense records.

- Budget is linked to a rejected application.

Do not allow a budget to be purged if it is linked to a rejected application.

General Processing

The budget will become complete once the Budget Calculation has been confirmed. If the sections of a completed budget are recalculated, the budget must first be set back to an 'in progress' status. The budget can be recalculated at any time before an eligibility determination has been made - i.e. the budget can be waiting for checking or waiting for the decision..

If there is already a budget in progress for a particular category type case for an eligibility determination, then that budget must be completed before another is opened.

When the status is changed to 'complete' - the system must determine if the worker who is completing the budget requires supervisory checking or if the type case specifies supervisory checking. If supervisory checking is required then an appropriate workflow message to the supervisor is created.

Technical note: The worker number and the supervisor number, in globals should also be stamped on the Budget worksheet record.

When a new version of a budget template is released, it will become available to all workers immediately. Any new budgets will use the 'Current' template version if it is the effective template version for the Budget date entered. However, any existing budgets using an old version will still be linked to the old version. The system will determine which Template version to use based on the Budget date entered by the user. If a budget is added retroactively an 'Obsolete' version may be used if it was current at the retroactive Budget date.

If the Budget Date is modified, the system will determine if the original template version is still in effect for the new Budget Date. If the template version is still in effect the system will allow the change in the Budget Date. If the template version has changed then the system will not allow the change in the Budget Date and an appropriate message will be displayed. The user will have to create a new budget with the new Budget Date and the new template version in effect will be used.

If the worker is displaying a budget with a status of 'completed' or 'waiting' the Copy From details (Determination Number and Budget Number) will be defaulted to the budget displayed.

If the Person Income/Expense, Non budget Member Income, Budget Questions changes before the worker has finished with the budget they will be forced to recalculate the budget. Check for changes in Person Income/Expense, Non Budget Member Income and Budget Questions as follows:

> Check for changes for any budget members with income or Non Budget Member income.
>
> Check for changes for this budget/month or any month covered by the budget (for quarterly budgets).

Check for changes in date of birth for minors used in budget calculations.

Check when worker 1. attaches the budget to a cert, 2. PF8 to complete the budget, 3. at decision to certify. 4. Check in progress budgets, 5. in progress certs.

Copy Processing

The ‘copy’ facility is only available on an Add action. The ‘copy’ function will copy the sections and lines from the ‘copy from’ budget to the one being Added. The ‘copy’ function will also create the appropriate budget members in the budget being Added. It will also create and copy the Member Calculation sections for these members if any exist.

The copy facility will only allow budgets using the same template version to be copied. There are a couple of exceptions. LTC templates for versions 0798 to 0901 and 0901 to 1002 can be copied.

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Budget Member Maintenance

```
Message Line
      BMBR                    *** M.E.D. SYSTEM ***                *DATE
      MEBMEMF               BUDGET MEMBER MAINTENANCE              *TIME

 *Action                  : _ (C,D,M,N,L)
 *CASE NUMBER             : _____________
 *DETERMINATION NUMBER    : ____ Budget Date: __/____ Status: ___________
 *BUDGET NUMBER           : ___  ___-___ Budget Test Cat ___________


 *Cmd *Case Member  Name                Birth Date EIE AU IU Inc *Section    Nts
  --- ------------- ------------------- ---------- --- -- -- --- ----------- ---
   _  _____________                                   _  _  _  _____________ +
   _  _____________                                   _  _  _  _____________ +
   _  _____________                                   _  _  _  _____________ +
   _  _____________                                   _  _  _  _____________ +
   _  _____________                                   _  _  _  _____________ +
   _  _____________                                   _  _  _  _____________ +
   _  _____________                                   _  _  _  _____________ +
   _  _____________                                   _  _  _  _____________ +

 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit  CMem  Bdgt  Back  Fwrd  BPer  BCal  Next  PIES
```

This function will display all the persons who are associated with the budget either as a potential AU member or as an IU member or as a person who was excluded for some reason. The user will be able to choose from the Persons who are listed as Case Members for the Case by using the help function on Case Member.

Fields

Action (A1)
: The action codes for this function are (C)lear, (D)isplay, (M)odify, (N)ext, (L)ast.

CASE NUMBER (N13)
: The number that identifies the Case. This field is mandatory. The client name will be displayed. The name will be displayed in the standard format. The client name will be the concatenation of the 2 clients - the probable clients will be used if the decision is for an application.

DETERMINATION NUMBER (N4)
: The number that identifies the Determination for which the budgets will be calculated. This field is mandatory.

BUDGET NUMBER (N3)
: The number that identifies the budget for an Eligibility determination. This field is mandatory. The category and type case for which the budget is being calculated will be displayed. The template and version being used will be displayed.

Budget Status Description (A15)
: The description of the status of the Budget. This is a display only field.

Budget Date (N6)
: The date for which the budget is being processed. This is an information only field. The month and year will be displayed.

Command (A1)

The command to add or remove a person from the budget. This is an optional field. Valid commands are: (A)dd, (R)emove. The worker must remove and re-add a person if they need to make a change.

Case Member Number (N13)

The Person number of the person who is a member of the case. This is an optional field. Help is available on this field. All the case members can be selected on the help screen by using the PF6 – All function key. The Person number entered must be a valid Case Member for the Case.

Member Name (A30)

A concatenation of Last Name, First Name and Middle Initial of the member. Display only field.

Birth Date (N8)

The Birth Date of the member. This is a display only field.

EIE (A1)

EIE Indicator. This is a display only field.

AU (A1)

An 'X' will be entered in this field if the member has been selected as a potential member for the proposed assistance unit. If this function has already been semi-completed, an 'X' will be displayed in this field corresponding to any members who have already been selected in a previous sitting.

IU (A1)

An 'X' will be entered in this field if the member has been selected as a potential member who will provide income for the proposed assistance unit. If this function has already been semi-completed an 'X' will be displayed in this field corresponding to any members who have already been selected in a previous sitting. A budget member must be either an AU or an IU or both.

Technical Note: The system will create the appropriate Section and Line records if the Person is marked as an IU member with income. The Section and Line records will not be created if the Person has zero income. The Section and Line records will be created with the bare minimum information. The Section record will be created with the Calc-indicator set to (N)o.

Section (A12)

This field will contain the section id of the budget template that must be completed for this member. This field will be mandatory if the worker has indicated that the member will provide income to the assistance unit, i.e. an 'X' has been entered under the IU column for the member. The section code will be a valid code for the template selected on the Budget Worksheet Maintenance screen. Help is available for this field. If the template has only one member calc (CM) section, the section will be entered programmatically if the worker leaves it blank.

Income Indicator (A1)

This field will indicate whether an IU member has income. This member with income will be part of the income unit and will be allocated a section of template. Members who have zero income, but are still part of the income unit, will not be allocated a section of the template because the section will not have to be captured. If the member has zero income, the worker will enter 'N' in this field. If a 'Y' is entered, the system will force the worker to capture the section. This field is mandatory if an 'X' is entered in the IU field.

Notes Indicator (A1)

Free format notes for the Budget Member. This is an optional 'moreable' field. These notes can be used to explain why a Case Member is excluded from the Budget calculation.

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Additional PF Keys

PF Key 5 - CMem

This key will point to the Case Member Maintenance screen. This screen will initially only show those people who are already in the case. If the worker is performing budget calculations and additional people must either be counted for the assistance unit or for the income unit, the worker will proceed to Case Member Maintenance where these people will be added to the case. If the people are not known to the system at all, there will be a function key from Case Member Maintenance to Person Maintenance where the worker will add the person to the system. Upon return to this function, the additional members will be available on help for the worker to choose.

PF Key 6 -Bdgt

This key will point to the Budget Worksheet Maintenance function.

PF Key 9 - BPer

This key will point to the Budget Person Maintenance screen.

PF Key 10 - BCal

This key will point to the Eligibility Section Maintenance screen.

PF Key 11 - Next

This key will point to the next function in the Budget Calculation process. The user will have indicated on the Budget Member screen which members have income and/or expenses. If there are any income or expenses to be input this key will point to the Income/Expense summary screen for the first budget member with income or expense to input. If no income and expenses to input then this key will point to the Budget Questions Depending on the category/type-case the LTC/Waiver, C-Related or Other budget questions will be displayed

PF Key 12 - PIES

This key will point to the Person Month Income/Expense Summary screen.

Processing

The Budget Members can only be modified if the Budget status is ‘in progress’.

Technical Note: The Worker number and Supervisor number of the current user must be stamped on the budget whenever a modification is made.

Add Processing

When a Budget Member is added the appropriate Budget Section is created for the member using the Template version section that is specified.

A Person Monthly Income record will be created for this budget member if one doesn’t already exist and the budget member is indicated as having income. Do not create one if the budget member has no income.

Technical Note: Call common routine ‘Create Section/Lines from Template’ for each member section.

Remove (Purge) Processing

When a Person is removed as a Budget Member the relevant Budget Section and all its Lines must also be purged if they already exist. The Person Monthly Income and Expense records will **not** be purged.

Budget Section Capture Process

The worker will capture the income/expense details on the Person Month Income/Expense Summary and Non Budget Member Income screens as well as the answers to the C-Related, LTC/Waiver or Other questions. During the calculation process only those sections where there are lines with line type U will be displayed to the worker. The sections with no user input lines will be calculated but not shown to the user. The eligibility section is always shown to the worker but if there are no lines needing user input it will be calculated first and the confirmation pop-up will be shown. The template - corresponding to the category type case - will dictate the allowable sections and the mandatory sections. It will also dictate the sequence of calculation.

The worker will enter this function from others:

If the worker is entering this function from another (e.g. Budget Maintenance, Budget Member Maintenance, Budget Questions, Person Month Income/Expense Summary, Non-Budget Member Income Summary), the Budget Section Browse will not be displayed. Instead, the system will calculate all the sections by simulating the PF11 – Next and PF12 – Calc function keys.

If the worker is entering this function from the Menu, the Budget Section Browse will display all the sections that will be captured for this budget. The sections will be either member level sections (already allocated) or unit level sections (automatically allocated via the system). The sections displayed on this screen may have been captured already.

If redoing the section capture, the budget will be set to 'in progress' to ensure no budgets are marked as 'completed' without doing the final budget calculation and confirming it. The budget can be recalculated any time before its eligibility determination has been completed or the budget has been used.

There are 7 types of sections available to be captured:

1. Pretest
2. Member Calculation
3. Spenddown
4. Extended Medicaid
5. Eligibility - this section will include the final budget calculation and confirmation of the system calculated eligibility decision. Once this confirmation has been received, the budget is ready to be checked. Once the budgets have been checked, they will be available to make the decision - certification or rejection.
6. Post Eligibility – these sections are used when eligibility has already been determined i.e. after the eligibility section has been completed.
7. Post Eligibility Completion Section – this section is used to tell the system that the worker has completed all the required Post Eligibility sections.

The capture screens will be set up according to the section type. The lines on the screen will be set up and processed according to the template section lines. The template section lines will be available in line order number sequence and must be set up on the screen in this order. The lines will be numbered on the Section Line Capture screens according to the corresponding external line numbers on the template section lines. (This will then tie in with the Instruction Report that will provide detailed instructions for the Template and its sections by line number.) The description of each line will be available from the template. This description will not be modifiable except for Spenddown budgets - where the template line description will be a default. Certain operators will be used to set up the description - the 'N' operators.

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Earned Income Exemption Processing Rules

Special processing is required to keep track of the Earned Income exemption so that it can be reported in the budget. This exemption applies to the individual if receiving benefits from LIFC and CHAMP. The individual gets a $30 plus a third exemption for 4 months and then the $30 exemption for another 8 months.

The business rules for the EIE are:

1. Budgets are treated as beginning the first of a month. LIFC and CHAMP recipients will receive benefits monthly. For EIE purposes, only the elapsed time in *months* is important.

2. EIE eligibility is only important for the Budget Date for which a budget is calculated. If the applicant is eligible for EIE at the moment when a Budget is calculated, then the person receives the EIE benefit for the entire duration of that Budget, *even if EIE runs out in the middle of that Budget*. If for some reason, a Budget is re-calculated in the middle of its duration, then the system will pick up the new EIE status of the applicant.

3. The deductions are:

   - $30 for up to 12 months.
   - 1/3 of the remainder (after deducting the $30) for the first 4 months only.

4. Duration and re-eligibility

   If the AU Member closes before receiving all four months (in a row) of the 1/3 deduction, the recipient gets a *brand new* EIE deduction (4/12) they next time they apply. In this case, AU Member close processing will reset the EIE dates on ME-PERSON. It is as if the person had never received EIE deductions.

   If the person does receive all 4 months of the 1/3 deduction, then the EIE dates *cannot* be reset when the AU Member closes. Suppose the person receives EIE for Jan, Feb, Mar, Apr ($30 + 1/3), and May ($30) 1998 and then the AU Member closes the last day of May 1998. Then in Nov 1998, the person re-applies for benefits. They are only eligible for the $30 for Nov and Dec 1998 because the EIE start date is Jan 1998.

   After receiving EIE for more than 4 months, the person is not eligible for EIE again until 12 months after they last receive LIFC *cash*. In the above example, the AU Member closes in May 1998. The Next EIE Entitlement date is set to May 1999. The applicant cannot use a new EIE again until June 1999, at which time they are eligible for a new 4/12 months.

   However, if the person re-applies before the original 12 month period has expired, they are eligible for the balance of the original 12 months. For example, a budget with EIE Start = Jan 1998 closes May 1998. The Next EIE Entitlement date is set to May 1999 (AU close + 12 months). In Nov, the person re-applies and can receive the $30 deduction. Suppose the new Budget is approved for a 3month duration. When it closes in Jan 1999, the Next EIE Entitlement date is changed from May 1999 to Jan 2000, since this is 12 months after the person last received LIFC cash. The Next EIE entitlement date is NOT Dec 1999 (12 months from original end of EIE eligibility). The EIE start date is still Jan 1998, even after the second Budget is approved.

MEDS will handle this exemption in the following way:

1. Type Case

   The type case will indicate if the exemption is possible.

2. EIE Indicator

   The system will check the value of the EIE Indicator field on the Budget Worksheet. If set to (N)o, the system returns zero and skips all EIE processing, if set to (Y)es, the system continues with the calculation.

2. Certification Process

   When using a budget containing an EIE the Certify process must do the following:

   The number of months remaining for both the $30 deduction and the 1/3 deduction must be copied from the budget worksheet section to the Person record

   - If the person is eligible for a full 4/12 EIE (either their first-ever EIE or it has been long enough since their previous one), set the EIE Start date to the Budget Date and reset the Next EIE Entitlement date.
   - If an EIE Start date already exists from an earlier Budget, do not update it (unless for a new full 4/12). If the new Budget is approved, the Next EIE Entitlement date should be set to the new AU Member close date + 12 months.

3. Budget Member Calculation Process

   The budget process will need to set up the number of months that the EIE is valid and the deduction. The template will dictate that the line is one where the number of months must be calculated.

4. Close an AU Member

   When closing an AU Member the following must be done:

   - If the Person was receiving the EIE then calculate how many months are remaining for the $30 deduction and for the 1/3 deduction. This is calculated by determining the length of the certification and subtracting the result from the months remaining for both deductions. Negative results should be replaced by zero. Update the months remaining fields on the Person record.
   - If EIE Start date exists and if the AU Member Close date is less than 4 months from the EIE Start date (i.e. the 1/3 months have not been used up) reset all the EIE fields on the Person record.
   - If EIE Start date exists and all 4 of the 1/3 months have gone by, then set the Next EIE Entitlement date to the AU Close date + 12 months. Do not modify the EIE Start date.

5. The PERSON entity will record the following details: EIE start date, Next EIE Entitlement date, Number of $30 months remaining and Number of 1/3 months remaining.

Line types

The line types will indicate how the line amount will be captured or set up and then processed. The different line types are:

U User Input
The worker will enter the amount. This will be a modifiable field.

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C Calculated Value
The system will calculate the value according to the template line's formula. The formula will consist of one or more operators with corresponding operands. (See Template Line Maintenance for an explanation of the calculations). The worker will not be able to change this field unless it is a user override.

Technical Note: The calculation occurs on an operand by operand basis within the Template. Bear in mind that if the 'Negative Allowed' is set to a 'N', and mid calculation your value becomes a negative amount, the calculation will automatically change the value to a 0 and continue with the calculation. This may skew the final amount drastically. Be sure to check the Template.

T Value from a table
The system will access a value from a table based on the value in a previous line (defined in the template line) and using a table (also defined in the template line). The calculation routine that retrieves this value will multiply this value by the number of months stored on the budget worksheet. The worker will not be able to change this field unless it is a user override.

F Fixed Value
A fixed value will be placed into the budget line amount. The fixed value will be a Template Line attribute. The calculation routine that retrieves this value will multiply this value by the number of months stored on the budget worksheet. However, this will only occur if the Override Allowed Indicator stored on the Template Line is set to 'N'. If this field is set to 'Y' then the fixed value will be assigned to the same value that is stored in the Fixed Value field on the template line. The worker will not be able to change this field unless it is a user override.

S Sum of Countable Income from Member Calculation Sections
The system will access all the Member Calculation sections (which will already have been processed) and sum the Countable Income of each section resulting in the amount for this line. If a member calculation Section is found with no countable income (an indicator will be set because countable income could be zero and valid), an error will be displayed to the worker and the budget will not be finalized until the section is corrected. The worker will not be able to change this field.

B Medical bills from Spenddown section
The system will access the total from the Spenddown section and place the value in this line.

E COLA Amounts from COLA section
The system will access the total from the COLA section and place the value in this line. The final COLA amount to disregard is rounded down to the nearest dollar before the value is placed in this line.

Z Sum of Unearned Income
The system will access all the Member Calculation sections (which will already have been processed) and sum the Unearned Income of each section resulting in the amount for this line.

I Sum of Earned Income
The system will access all the Member Calculation sections (which will already have been processed) and sum the Earned Income of each section resulting in the amount for this line.

D Derived Value
Data from Non Budget Member Income or Person Monthly Income/ Expense (can be earned income, unearned income or expenses).

The data from Person Monthly Income/Expenses or Non Budget Member Income will be used to populate this line and any fields for income and expense that already exist on the Budget Worksheet Line records. See detailed explanation below in *Determining Budget Values for Line Type D (Data)*.

Q Answer from one of the Budget questions.
The system will set the amount for this line equal to the answer to the question specified on the template with the following translation:

if answer is equal to Y then set the budget amount on the line equal to 1

if answer is equal to N then set the budget amount on the line equal to 0

if answer is numeric then set the budget line equal to the question answer.

If the answer is a date (Q10), the number of days remaining to the end of the month will be calculated and entered on the line.

G Sum of countable earned income from member calculation sections.
The system will access all the Member Calculation sections (which will already have been processed) and sum the Countable Earned Income of each section resulting in the amount for this line.

H Sum of countable unearned income from member calculation sections
The system will access all the Member Calculation sections (which will already have been processed) and sum the Countable Unearned Income of each section resulting in the amount for this line.

A Dependent care allowance.
This line value is calculated by the system. As not all budgets are monthly budgets and may cover up to 3 months, the dependent care allowance must be calculated for each month of the budget.

For **every month** (we will call these budget cover months in the explanation below) starting from Budget Month for the Number of Months process as detailed below in Process Budget Cover Month.

Note: On monthly budgets the Number of Months is always 1. On quarterly budgets the number of months may be 1, 2 or 3.

Process Budget Cover Month Process

The system will read all Person Monthly Expense records for the section member/budget cover month with dependent care expense = Y.

Split the expense between dependents if necessary:

As we need to accumulate expenses per dependent any dependent care expense, which is for multiple dependents, needs to be split between them. Split evenly between the number of dependents detailed on the expense. Take care when rounding to make sure that the split amounts do actually add up to the total expense. Any adjustments to be made for rounding should be made to the first dependent. For example $100 split between 3 dependents needs to be $33.3**4**, $33.33 and $33.33.

For each different dependent:

Accumulate all expenses for that dependent.

Determine if dependent is under 2 on the 1st of the Period Month being processed.

Determine maximum monthly dependent care expense allowance for dependent. There is a different allowance for dependents under 2, and dependents 2 and over. These values should be set up in the standard value table so they are effective dated. We can have 2 entries, 1

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for under 2 and another one for 2 and over. (Look at the budget template line type of T for accessing standard values.)

Determine monthly dependent care allowance that is the lesser of total expense for the dependent or maximum for that dependent depending on their age.

Accumulate dependent care allowance for all dependents; the result is the BUD-LINE-AMT for this budget line.

Determining Budget Values for Line Type D (Data)

A budget line type of D is used to specify that the data is derived from elsewhere in the system. It is used for Income and Expense information. The following process describes how the budget amount and additional income and expense fields for the Budget Worksheet Line are determined.

If Line Type is equal to D the budget template specifies what type of data is to be used, whose data is to be used and any specific expense or unearned income types within that data type to be used.

What we are trying to do here is determine the following:

- What should be included in this line?

  Is it Earned Income, Unearned Income, All Income or Expenses? This tells us which amounts to use.

- Whose Earned Income, Unearned Income or Expenses should be included?

  Is it the Member on the Budget Member Calculation Section, all the AU members for the budget, all the IU Members for the budget, a second parent, the Community Spouse, Sponsor's Spouse, Ineligible children, dependents. This tells us whose data to include. For Section Member, All AU members and all IU members we use data from Person Monthly Income and Person Monthly Expense. For Second Parent, Community Spouse, Sponsor's Spouse, Ineligible Children and Dependants we first go to the Case Budget Info record to find out who if any are defined as a person on MEDS. For those who are defined as a person in MEDS we use data from their Person Monthly Income and Person Monthly Expense records. For those who are not defined as a person on MEDS we use their data from Case Monthly Income record.

- If we're including expenses is it all Medical Expenses Deduction only, Regular expenses only (i.e. all except Medical Expenses Deduction), specific expense types only, all Medical Expenses Deduction except specific expense types, all regular Expenses except specific expense types,

- If we're including unearned income is it all unearned income, specific unearned income types only, or all unearned income except specific types.

1. What to be Included

Data Type	Fields to be populated on Budget Worksheet Line	Fields to be used from Case Monthly Income, Person Monthly Income and Person Monthly Expense
Earned Income	BUD-LINE-AMOUT INCOME-TYPE INC-TYPE-PRES-IND EMPLOYER fields for employers 1 thru 4.	EARNED-INC-AMT Set to 00 Set to Y Use fields with same names. There is the possibility of having more than 4 lots of

		employer information as we may be combining income for multiple people and multiple months. If more than 4 then leave out the details for the extra employers but still include them in the total for BUD-LINE-AMT.
	BUD-LINE-NOTES	If there are any self-employed business expenses populate the budget worksheet line notes with: 'Self employment business expenses included in line amount". (Note: we do not move the self-employed business expense detail to the budget worksheet line). If more than 4 employers then populate the budget worksheet line notes with: 'More than 4 employers for this line, all details not shown'.
Unearned Income	BUD-LINE-AMT	Total of UNEARNED-AMOUNT for income types required on this line and which are included in UNEARNED-INC-INFO PE. Total of all UNEARNED-AMOUNTs from UNEARNED-INC-INFO PE where the corresponding UNEARNED-INC-TYPE is equal to one of the Income types to be included on this line. See below to determine which Unearned income types to be included.
	INC-TYPE-PRES-IND	Set to Y.
	INCOME-TYPE	Set to blank.
	INC-TYPE-INFO (PE)	Populate with INC-TYPE-CODE and UNEARNED-AMOUNT from the UNEARNED-INC-INFO PE. As there may be multiple person or case monthly income records being added into this one budget line there is a possibility more than 10 unearned amounts need to be populated on one budget line. If there are more than 10 lines then combine lines with the same unearned income type on one line. If still more than 10 lines combine any amounts over 10 into the tenth line and reset INC-TYPE-CODE for the tenth line.
	BUD-LINE-NOTES	If any amounts have been combined in tenth line then populate Budget Notes with 'Too many types of unearned income to be detailed'
All Income	BUD-LINE-AMT	The processing is the same as for Earned and Unearned added together. Do not populate other fields to provide details as done for earned and unearned.
Expenses	BUD-LINE-AMT	EXP-AMT. There is only place on a budget line for detail on Medical Expenses Deduction. All other expenses result in the BUD-LINE-AMT with no detail stored.
	MED-EXP-INFO	EXP-AMT. EXP-TYPE-CODE. For Medical Expenses Deduction, there is a possibility more than 10 medical expenses deduction amounts need to be populated on one budget line. If there are more

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	BUD-LINE-NOTES	than 10 lines then combine lines with the same expense type on one line. If still more than 10 lines combine any amounts over 10 into the tenth line and reset EXP-TYPE-CODE for the tenth line. If any amounts have been combined in tenth line then populate Budget Notes with 'Too many types of Medical Expenses Deduction to be detailed'

2. Whose Earned Income, Unearned Income or Expenses should be included and for what months?

Data Belonging to	How to determine MEDS Person ID or Case income contributor
Member on CM section	Use Person ID of Member on Budget Member Calculation Section
All AU Members	Use Person IDs of all budget members defined as AU members and add all amounts together.
All IU Members	Use Person IDs of all budget members defined as IU members and add all amounts together.
Second Parent	Look at case budget month in the PE ADDTL-CASE-INCOME where CASE-INC-CONTRIB-TYPE is 2P to determine if the second parent has a MEDS ID. If CASE-INC-PERSON-NUM is present then use this Person ID. If second parent does not have a MEDS ID they are not defined as a person on MEDS so use Income Contributor of 2P to find the record on Case Monthly Income.
Community Spouse	Same as second parent but use Income Contributor of CS instead of 2P to find the Case Monthly Income record.
Sponsor's Spouse	Same as second parent but use Income Contributor of SS instead of 2P to find the Case Monthly Income record.
Ineligible Children	Same as second parent but can be up to 4 children so use Income Contributors of C1, C2, C3 and C4 (may be a combination of some with and some without MEDS Person IDs) and add all amounts together.
Dependants	Same as ineligible children but use Income Contributors of D1, D2, D3 and D4 not C1, C2, C3 and C4.

For all people with a MEDS Person ID.

For **every month** (we will call these budget cover months in the explanation below) starting from Budget Month for the Number of Months, as defined on Budget Worksheet, process as follows:

Get the one Person Monthly Income record for this person and the budget cover month to get the income data.
Get all the Person Monthly Expense records for this person and the budget cover month to get the expense data.

Note: On monthly budgets the Number of Months is always 1. On quarterly budgets the number of months may be 1, 2 or 3.

For all people with no MEDS Person ID

For **every month** (we will call these budget cover months in the explanation below) starting from Budget Month for the Number of Months, as defined on Budget Worksheet, process as follows:

Get the Case Monthly Income record for the case, the budget cover month and the income contributor to get the income data. There is no expense data for Case Income Contributors.

Note: On monthly budgets the Number of Months is always 1. On quarterly budgets the number of months may be 1, 2 or 3.

3. What types of expenses should be included

If Expenses on the template line is equal to I then include all expenses with expense type where LTC Medical Expenses Deduction is equal to Y.

If Expenses on the template line is equal to R then include all expenses with expense type where LTC Medical Expenses Deduction is not equal to Y.

If Expenses on the template line is equal to S then only include expenses with an expense type equal to one of the 10 expense types specified on the template line.

If Expenses on the template line is equal to J then include all expenses with expense type where LTC Medical Expenses Deduction is equal to Y except those with an expense type equal to one of the 10 expense types specified on the template line.

If Expenses on the template line is equal to K then include all expenses with expense type where LTC Medical Expenses Deduction is not equal to Y except those with an expense type equal to one of the 10 expense types specified on the template line.

4. What types of Unearned Income should be included

If Unearned Income on the template line is equal to A then include all unearned income.

If Unearned Income on the template line is equal to S then only include unearned income with an income type equal to one of the 10 unearned income types specified on the template line.

If Unearned Income on the template line is equal to J then include all unearned income except those with an income type equal to one of the 10 unearned income types specified on the template line.

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Earned Income Amount Frequency pop-up Window:

```
Message Line …
                  *** M.E.D. SYSTEM ***           *DATE
 MEBAMTM1           INCOME FREQ POP-UP            *TIME

           Confirm missing amount(s) OK? (Y/N)  _

 Employer: ____________________  Employer Total:
    *Freq: _

      Date            Amount
   __ / __ / ____  ____________     __ / __ / ____  ____________
   __ / __ / ____  ____________     __ / __ / ____  ____________
   __ / __ / ____  ____________     __ / __ / ____  ____________
   __ / __ / ____  ____________     __ / __ / ____  ____________
   __ / __ / ____  ____________     __ / __ / ____  ____________


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10
      Help        Cont        Canc        Prev  Next
```

When the budget is calculated Earned Income will be retrieved from Person Month Income and Non Budget Member and will be populated on the Earned Income Amount Frequency pop-up according to the criteria indicated on the Template Line (Line Type D) and all the fields on the pop-up window will be display only.

If User input is required (Line Type U) on a line the Earned income will be entered on the pop-up.

Fields

Employer (A20)
: The name of the employer. This field is mandatory if any income amounts are entered.

Employer Total (N11.2)
: The averaged total for the employer of the above incomes according to the above table. This will be accumulated for all employers and the accumulated amount will be placed on the Budget line. Amounts are rounded to the nearest whole dollar amount if the template value for the rounding indicator is set.

Frequency (A1)
: The frequency of the income from the employer. The valid values are described in the table above. The frequency entered must be a valid frequency code. This field is mandatory if the corresponding date is entered.

Dates (N8)
: The date of the income amount from the employer. The date entered must be a valid date. This is an optional field.

Amounts (N9.2)
: The income amount from the employer. This field is mandatory if the corresponding date is entered.

Missing Amount Confirmation (A1)
: A confirmation from the worker that the worker is aware of the missing amounts and whether it is okay to have missing amounts. Valid values: (Y)es, (N)o. This field is *hidden* unless the number of amounts entered is less than the number of amounts required by frequency, as indicated in the frequency table above. The system should also display an *error message* if the number of amounts entered is less than the number required by frequency. The amount window will remain open until the correct number of amounts are entered OR until the value of this field is (Y)es. The worker will

be able to add a note about the missing amounts using the appropriate PF Key from the original screen.

Technical Note: This field is not stored on the database. It is an indicator used by the system only during online processing.

Once the amounts have been converted and accumulated for all employers, the calculated monthly amount will be converted again to the frequency indicated by the budget. This frequency will have been set to the Template default but could have been overridden for a particular budget (in Budget Maintenance). Valid frequencies are 'monthly' and 'quarterly'.

PF Keys

PF Key 3 – Continue
This will return to the Budget Section Capture screen passing back with total for all employers.

PF Key 7 - Previous
This key will point to the Earned Income Amount Frequency window for the last employer.

PF Key 8 - Next
This key will point to the Earned Income Amount Frequency window for the next employer.

Multiple Income Types pop-up Window:

Sometimes it may be necessary to enter more than one Income Type on the same budget line (*e.g.* two different types of unearned income, both of which must be entered on the same Budget line.) In this case, the Template line should have "Allow Multiple Income Types" set to (Y)es. When the worker enters 'Y' on the Budget line capture field (below) then the Multiple Income Types window will appear.

When the budget is calculated Unearned Income will be retrieved from Person Month Income and Non Budget Member and will be populated on the Multiple Income Type pop-up according to the criteria indicated on the Template Line (Line Type D) and all the fields on the pop-up window will be display only.

If User input is required (Line Type U) on a line the unearned income will be entered on the pop-up.

```
Message Line …
              *** M.E.D. SYSTEM ***      *DATE
MEBAMTM2       INCOME TYPES POP-UP       *TIME

        Mnthly Inc Amt      *Income Type
   1.  _______________   __  Description
   2.  _______________   __  Description
   3.  _______________   __  Desc
   4.  _______________   __  Desc
   5.  _______________   __
   6.  _______________   __
   7.  _______________   __
   8.  _______________   __
   9.  _______________   __
   10. _______________   __

        Total Income: ____________

Enter-PF1---PF2---PF3---PF4---PF5---PF6---
      Help        Cont        Canc
```


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Fields

Income Amount (N11.2)
Income amount to be entered by the worker

Income Code (A2)
Income type code. Mandatory if an income amount is entered. Entered codes will be validated against the income type file. The system will display the corresponding income type description in a display-only field.

Total (N11.2)
System calculation of the entered incomes. This is the amount that will be stored on the Budget line.

Medical Expenses Deduction pop-up Window:

Medical expenses deduction can be entered on the same budget line. The pop-up window allows multiple amounts to be entered with a code to distinguish between various expenses. In this case, the Template line should have “Medical Expenses Allowed” set to (Y)es. When the worker enters ‘Y’ on the Budget line capture field (below) then the Medical Expenses Deduction window will appear.

When the budget is calculated Medical Expenses Deduction will be retrieved from Person Month Expense and will be populated on the Medical Expense Deduction pop-up according to the criteria indicated on the Template Line (Line Type D) and all the fields on the pop-up window will be display only.

If User input is required (Line Type U) on a line the Medical expenses deduction will be entered on the pop-up.

```
Message Line …
              *** M.E.D. SYSTEM ***      *DATE
MEBAMTM3    MEDICAL EXPENSE DEDUCTION    *TIME

       Expense Amount       *Expense Type
   1.  _______________   __  Description
   2.  _______________   __  Description
   3.  _______________   __  Description
   4.  _______________   __  Description
   5.  _______________   __
   6.  _______________   __
   7.  _______________   __
   8.  _______________   __
   9.  _______________   __
   10. _______________   __

   Total Medical Expense: ____________

Enter-PF1---PF2---PF3---PF4---PF5---PF6---
      Help        Cont        Canc
```

Fields

Expense Amount (N11.2)
Medical Expense amount to be entered by the worker

Expense Type (A2)
Medical Expense Type code. Mandatory if an expense amount is entered. Entered codes must be one of the valid expense types. The system will display the corresponding expense type description in a display-only field.

Total Medical Expense (N11.2)

System calculation of the entered medical expense amounts. This is the amount that will be stored on the Budget line.

Rounding rules will be applied to all calculations.

1. Round only when calculating gross earned income.
2. When calculating gross monthly earned income, round to the nearest dollar after each calculation. Round down when amount equals 49c or less. Round up when amount equals 50c or more.
3. Do not round until after conversion for weekly, biweekly and semi-monthly earnings.

General Calculation Rules:

1. The result of a calculation will be set to zero if the result is negative.
2. The section from which lines can be summed must be calculation sections.
3. The values of the lines are calculated in order – from the first to the last line. There will be no iterations of calculations. Validation will ensure that the operand(s), in a calculation formula, has(ve) already been defined.

General Navigation Rules for Next key processing:

The sections will be processed in the following order:

COLA Section (if it exists)

Deeming Member Calculation Sections (if they exist)

Pretest Section (if it exists)

Non Deeming Member Calculation Sections (if they exist)

Eligibility Section

Spenddown Section (if it exists)

Post Eligibility Sections (if they exist)

Eligibility Section again (if Spenddown and/or Post Eligibility exists)

Post Eligibility Completion Section (if it exists)

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Budget Section Capture

```
Message Line
    BSEC                     *** M.E.D.SYSTEM ***                    *DATE
    MEBSECB                BUDGET SECTION CAPTURE                    *TIME

 Case Number          : _____________ ______________________________
 Determination Number : ____            Budget Status : ________
 Budget Number        : ___ ___-___ ______ ____  Date : MM/YYYY

 Member Name                        SSN        Section    Type  Income  Calc
 ----------------------------- ----------- ------------ ----  ------  ----
 ______________________________ ___-__-____ _____________  __      _      _
 ______________________________ ___-__-____ _____________  __      _      _
 ______________________________ ___-__-____ _____________  __      _      _
 ______________________________ ___-__-____ _____________  __      _      _
 ______________________________ ___-__-____ _____________  __      _      _
 ______________________________ ___-__-____ _____________  __      _      _
 ______________________________ ___-__-____ _____________  __      _      _
 ______________________________ ___-__-____ _____________  __      _      _
 ______________________________ ___-__-____ _____________  __      _      _

*Case Number:_____________ *Det Number: ____  *Budget Number: ___
*Tran: ________ Act: _ Key: ____________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help  Menu  Retn  Quit        Bdgt  Back  Fwrd  Bcal  BDa?   PIES   Vrsn
```

This screen shows all the sections that will be included in the budget. The worker will be able to proceed to the required section capture screen by placing the cursor on the specific line and pressing PF9 or ENTER. This function will be available for restarting the budget calculation, i.e. sections have already been allocated to the income unit members and some may have been captured before a break in processing. This is a display screen only.

The following information is displayed for the budget:

- Case number and client name
- Determination number and status
- Budget number, budget type case, template id, template version and budget date
- Member Name
- SSN
- Section Id
- Section Type
- Income Indicator
- Calculation Indicator

Additional PF Keys

PF Key 6 -Bdgt
This key will point to the Budget Worksheet Maintenance function.

PF Key 9 - BCal
This key will point to the Eligibility Section Maintenance screen.

PF Key 10 – BDa?

This key will point to the Initial Budget Data screen. It will either be BDaO – Other Budget Questions, BDaL – LTC/Waiver Budget Questions or BDaC – C-Related Budget Questions.

PF Key 11 - PIES

This key will point to the Person Income Expense/ Summary screen. Populate with member number from the section if there is a member for the section the cursor is placed on.

PF Key 12 - Vrsn

This key will point to the Template Version Notes information screen.

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Budget Pretest Section Maintenance

```
PROGRAM                      *** M.E.D.SYSTEM ***                        *DATE
SEP 12,1998                 - SECTION MAINTENANCE -                      *TIME

 Action                  : _ (C,D,M,N,L)
*CASE NUMBER             : _____________ ____________________________
*DETERMINATION NUMBER    : ____ Budget Date: MM/YYYY Status: ________
*BUDGET NUMBER           : ___ ___-___ ______ ____
*BUDGET SECTION NUMBER   : ___________ ________________________________
 Section Notes           : ____________________________________________ +
                                    Override
 LINE   Description                            Amount   Det Nts Inst Alwd Ind
 ____ ________________________________  ___________0.00  +   +   +    _    _
 ____ ________________________________  ___________0.00  +   +   +    _    _
 ____ ________________________________  ___________0.00  +   +   +    _    _
 ____ ________________________________  ___________0.00  +   +   +    _    _
 ____ ________________________________  ___________0.00  +   +   +    _    _
 ____ ________________________________  ___________0.00  +   +   +    _    _
 ____ ________________________________  ___________0.00  +   +   +    _    _
 ____ ________________________________  ___________0.00  +   +   +    _    _

*Tran: ________ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help  Main  Retn  Quit        Bdgt  Back  Fwrd  BMbr  BCal   Next   Calc
```

This screen is displayed if the section type is ‘PR - Pretest’. The income for a pretest will be captured. Not all budgets have a pretest facility. This screen will only be available if the template specifies that a pretest is possible.

The fields on the maintenance screen are described below:

Heading Fields

Action (A1)
: The action codes for this function are (C)lear, (D)isplay, (M)odify, (N)ext, (L)ast.

CASE NUMBER (N13)
: The number that identifies the Case. This field is mandatory. The client name will be displayed. The name will be displayed in the standard format. The client name will be the concatenation of the 2 clients - the probable clients will be used if the decision is for an application.

DETERMINATION NUMBER (N4)
: The number that identifies the Determination for which the budgets will be calculated. This field is mandatory.

BUDGET NUMBER (N3)
: The number that identifies the budget for an Eligibility determination. This field is mandatory. The description of the category and type case for which the budget is being calculated will be displayed. The description of the template and version being used will be displayed.

BUDGET SECTION NUMBER (N3)
: The number that identifies the budget section for an Eligibility determination. This field is mandatory. The section id and section name will be displayed.

Budget Date (N6)
: The date for which the budget is being processed. This is an output only field.

Status (A15)
: The description of the status of the Budget. This is a display only field.

Section Notes (5*A45)

Free format notes captured against the section. This is an optional 'moreable' field. The budget must be In-Progress to modify the Notes.

Pretest Section Fields

Line (N4)

The line number of the line within the section. This number will correspond to the line number in the Template. This is a display only field.

Description (A30)

The description of the line. The description will be accessed from the template. Output only field.

Amount (N11.2)

The income amount. This field will be entered by the worker or set by the system (value accessed from a table, value accessed from the template, value brought forward from other sections or value calculated) and displayed to the worker. The template will dictate whether the amount is a 'user input' field or not.

Det (A1)

An instruction to the system to display one of the Income Amount or Medical Expenses Deduction pop-up windows. The worker will enter a 'M' in this column to capture the amounts or show the already captured amounts. A 'M' will cause an amount capture window to open. The window that opens depends on the values of the 'Allow Multiple Income Types', 'Medical Expenses Allowed' and 'Inc Type Pres Indic' fields. If Allow Multiple Income Types is 'Y' then the Multiple Income Types window will open. If Medical Expenses Allowed is 'Y' then the Medical Expenses Deduction window will open. If the Inc Type Pres Indic field is set to 'Y' then the Income Amount Frequency window will open.

Currently Detail is only available on user input lines. When the budget line amount is line type D the user will be able to pop up the details for display but not change them. User should be able to put in a M even though this is not user input.

If line type is D determine which pop up to use as follows:

If there is any employer data on this line (check employer info for any 1 of the 4 employers) then pop-up Income Amount Frequency

If there is any unearned income on this line (check INC-TYPE-INFO PE for data) then pop-up Multiple Income Types

If there are any expenses on this line (check MED-EXP-INFO PE for data) then pop up Medical Expenses Deduction.

Technical Note: Use the three common routines 'Income Amount Pop-up Module 1 & 2 and Medical Expenses Deduction Pop-up'.

Person Monthly Income/Expense and Non Budget Member Income can be changed after being used on a budget. The budget is not automatically updated when the change occurs.

Notes (A1)

Free format notes captured against the line item. The worker will enter an 'M' in this field to open a window to allow the capture of the notes.

Technical Note: The notes are an optional 'moreable' field. Display a pop-up window to allow maintenance of the notes.

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Instr (A1)
An instruction to the system to display the appropriate Template Line instructions. The worker will enter a 'M' to see a pop-up window with the instructions. The instructions will be display only.

Override Allowed Indicator (A1)
An indicator to say if the user is allowed to override the value of the calculated field. This field is display only.

Override Indicator (A1)
An indicator to say if the user actually has overridden the calculated value. This field is only available if an override is allowed. Valid values are (Y)es, (N)o. The user must enter (Y)es in this field if they want to override the system calculated value. If the user types over the system calculated value, but does not enter a (Y)es in this field the system will replace the user entered number with the system calculated value. The user can change the value of this field to (N)o to make the system re-calculate the field if they decide that the value they entered is incorrect.

Additional PF Keys

PF Key 6 -Bdgt
This key will point to the Budget Worksheet Maintenance function.

PF Key 9 - BMbr
This key will point to the Budget Member Maintenance screen.

PF Key 10 - BCal
This key will point to the Eligibility Section Maintenance screen.

PF Key 11 - Next
This key will point to the next function in the Budget Calculation process - the next Section Maintenance screen or the Budget Calculation - the Eligibility Section.

PF Key 12 - Calc
This key will calculate the section after the user has entered all the required fields. The user will be able to recalculate the section at any point in time before the budget is used.

Technical Note: When the calculate key is used, the system will calculate all of the lines in the section and set the calculated indicator on the section to (Y)es. Whenever a line is changed the calculated indicator on this section and other sections which follow in the budget section capture order must be reset to blank. This is because values can be carried over from one section to another.

PF Key 19 - Instructions
Any instructions for the section will be displayed. These instructions will have been captured when setting up the template and cannot be changed.

PF Key 20 – Capt
This key will toggle between the different methods of capturing the section (i.e. Short/Long version).

Processing

Each line will be set up according to the rules of the template. The line type will determine whether the frequency and amount will be entered by the worker or protected and calculated by the system. The worker will always be able to enter notes against a line. The worker will always be able to view the instructions of a line.

When a Pretest section is calculated, if the Pretest Eligibility Line Amount is greater than 0 it means the budget is ineligible at pretest. If this is the case pop-up the following window to ask the worker if they

agree and whether they want to mark the budget as ineligible, or keep going and complete the rest of the budget.

If the pretest Eligibility line Amount is less than or equal to 0 and this is a spenddown type case then this is an error, with the following error message Invalid Type Case - Spenddown budget not appropriate. This will stop workers using Type Case 21 (or any other spenddown type case) budgets when they shouldn't be because the case is already eligible without using spenddown.

If the pretest Eligibility line Amount is less than or equal to 0 do not pop up this window, continue to the next section.

```
Pretest Outcome: INELIGIBLE
Mark Budget INELIGIBLE : _ (Y/N)
```

Fields

Pretest Outcome (A10)
: The Pretest Outcome is 'Ineligible' if the value of the line that contains the Final Eligible Amount is greater than zero. This field is display only.

Mark Budget INELIGIBLE (A1)
: This input field, that is not stored on the database, enables the user to enter 'Y' and complete the budget with an updated budget status of 'Ineligible'. It is currently on the Pretest section window but a Pop up is required, as we now want to calculate all sections with no user input if possible.

185% Pretest on LIFC/PAP templates

1. If the pretest section template has Student Pretest Indicator set to Y then a pretest section for this budget will be added if the answer to case question 'Is there a LIFC child who is a student with Earned Income?' is equal to Y.

   Technical Note: The Pretest section will be created when the budget is added and then depending on the answer to question ' Is there a LIFC child who is a student with Earned Income?' the section will be deleted if answer is (N)o or created if answer (Y)es and the section does not already exist.

2. If 'Is there a LIFC child who is a student with earned income?' is (Y)es, then there must be a budget member with student income (Student earnings on PIES Earned income pop-up). If a student with income is included in the budget then ' Is there a LIFC child who is a student with earned income?' must be (Y)es.

3. Calculate the Pretest section, and

   If ineligible:

   - Determine for how many months in the current calendar year, the exclusion has been applied:
     - if more than 6 times, the budget must be marked as ineligible
     - if less the 6 times, record the fact that we have to exclude the student's income (add morable on PERS/PERX (*Student Earned Inelig Months*) that will show the month/year the student income caused the pretest to be ineligible and will be modifiable on PERX) and continue calculating budget **excluding student's earned income.** Student will still be counted as AU/IU member in Eligibility section.

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If eligible:

- Determine for how many months in the current calendar year, the exclusion has been applied:
  - if more than 6 times, continue with the budget calculation
  - if less than 6 times, continue calculating budget **excluding student's earned income**. Student will still be counted as AU/IU member in Eligibility section.

4. Since we have no way of determining which budgets actually disregarded student income based on an ineligible determination up to this point in time, a message will be displayed in the future when an analyst gets the ineligible determination at the student pretest section. The message should read, "CONTACT MEDS UNIT FOR STUDENT EARNINGS". The analyst will NOT be able to complete the budget and a function key (PF5-Cancel) will allow the analyst to cancel the budget calculation. The message will only be needed for the first calendar year. Once the analyst contacts the MEDS unit, we will find out which months (if any) analyst received ineligible determination for this year and will enter the month(s) of ineligible pretest using PERX. Once this is done, the analyst should not receive the message again.

```
CONTACT MEDS UNIT FOR STUDENT EARNINGS - PF5 TO CANCEL

      Pretest Outcome :      INELIGIBLE
      Mark Budget INELIGIBLE  :  N (Y/N)
```

Technical Note: This processing will only be needed for 2003.

5. The operator 'SE' will be used on the template to indicate whether student earnings should be included or excluded (returns a 0 if a student's earned income should be excluded (LE 6 exclusion months) from the budget and a 1 if the income should be included).

Technical Note: The Worker number and Supervisor number of the current user must be stamped on the budget whenever a modification is made.

Budget Member Calculation / Post Eligibility Section Maintenance

```
Message Line …
     BCAL                    *** M.E.D.SYSTEM ***                    *DATE
     MEBSECF              BUDGET SECTION MAINTENANCE                 *TIME

*Action               : _ (C,D,M,N,L)
*CASE NUMBER          : _____________ ______________________________
*DETERMINATION NUMBER : ______ Budget Date: MM/YYYY Status: ________
*BUDGET NUMBER        : ____ ___-___ ______ ____
*BUDGET SECTION NUMBER: __________ ________________________________
 Section Notes        : ____________________________________________ +
 Member               : ______________________________ ___-__-___ Override
 LINE Description           Income Type     Amount Mth Det Nts  Ins  Alw  Ind
 ____ ______________________________ __ _____________ +   +   +    +    _    _
 ____ ______________________________ __ _____________ +   +   +    +    _    _
 ____ ______________________________ __ _____________ +   +   +    +    _    _
 ____ ______________________________ __ _____________ +   +   +    +    _    _
 ____ ______________________________ __ _____________ +   +   +    +    _    _
 ____ ______________________________ __ _____________ +   +   +    +    _    _
 ____ ______________________________ __ _____________ +   +   +    +    _    _
 ____ ______________________________ __ _____________ +   +   +    +    _    _

*Tran: ________ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help  Main  Retn  Quit  Copy  Bdgt  Back  Fwrd  BMbr  BCal   Next   Calc
```

This screen will be displayed if the section type is ‘CM – Member Calculation’. There will be one Member Level Section Maintenance screen for each member indicated as being part of the income unit and who has income. If a household member is part of the income unit but does not have income, the system will record a member level section with zero income and this screen will not be shown to the worker for the member.

The fields on the maintenance screen are described below:

Heading Fields

See Pretest Section Maintenance.

Member Section Fields

Member (A30)
: A concatenation of Last Name, First Name and Middle Initial of the member will be displayed. Output only field. This will be the name of the member whose income will be captured in this section. The SSN of the member is also displayed.

Line (N4)
: The line number within the section. This number will correspond to the line number in the Template. This is a display only field.

Description (A30)
: The description of the line. The description will be accessed from the template. Output only field.

Income Type (A2)
: The type of income of the amount on the line. Output only field.

Amount (N11.2)
: The system calculated income amount. Output only field. The amount will be set by the system and displayed to the worker (if the worker is using the long version of the budget). The template will

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dictate whether the amount is a 'user input' field or not. If the amount requires user input, the detail column corresponding to the required line will be set to 'M' so that the amount capture window opens when processing this line. This window is described above and will allow the worker to enter the frequency and the income amounts. The calculated amount will be returned to this line's amount.

Mth (A1)

An instruction to the system to display the monthly amounts used to calculate the quarterly amount. The worker will enter a 'M' in this field to open a window to view the monthly amounts.

Technical Note: This moreable is only available on non deeming member calculation sections as well as any line type D and A on quarterly budget.

Det (A1)

An instruction to the system to display one of the Income Amount or Medical Expenses Deduction pop-up windows. The worker will enter a 'M' in this column to capture the amounts or show the already captured amounts. A 'M' will cause an amount capture window to open. The window that opens depends on the values of the 'Allow Multiple Income Types', 'Medical Expenses Allowed' and 'Inc Type Pres Indic' fields. If Allow Multiple Income Types is 'M' then the Multiple Income Types window will open. If Medical Expenses Allowed is 'M' then the Medical Expenses Deduction window will open. If the Inc Type Pres Indic field is set to 'M' then the Income Amount Frequency window will open.

If line type is D determine which pop up to use as follows:

If there is any employer data on this line (check employer info for any 1 of the 4 employers) then pop-up Income Amount Frequency

If there is any unearned income on this line (check INC-TYPE-INFO PE for data) then pop-up Multiple Income Types

If there are any expenses on this line (check MED-EXP-INFO PE for data) then pop up Medical Expenses Deduction.

Technical Note: Use the three common routines 'Income Amount Pop-up Module 1 & 2 and Medical Expenses Deduction Pop-up'.

Notes (A1)

Free format notes to be captured against the line item. The worker will enter a 'M' in this field to open a window to allow the capture of the notes.

Technical Note: The notes are an optional 'moreable' field. Display a pop-up window to allow maintenance of the notes.

Instr (A1)

An instruction to the system to display the appropriate Template Line instructions. The worker will enter a 'M to see a pop-up window with the instructions. The instructions will be display only.

Override Allowed Indicator (A1)

An indicator to say if the user is allowed to override the value of the calculated field. This field is display only.

Override Indicator (A1)

An indicator to say if the user actually has overridden the calculated value. This field is only available if an override is allowed. Valid values are (Y)es, (N)o. The user must enter (Y)es in this field if they want to override the system calculated value. If the user types over the system calculated value, but does not enter a (Y)es in this field the system will replace the user entered number with the system calculated value. The user can change the value of this field to (N)o to make the system re-calculate the field if they decide that the value they entered is incorrect.

Additional PF Keys

PF Key 5 - Copy
This key will point to the Copy window (discussed below).

PF Key 6 -Bdgt
This key will point to the Budget Worksheet Maintenance function.

PF Key 9 - BMbr
This key will point to the Budget Member Maintenance screen.

PF Key 10 - BCal
This key will point to the Budget Calculation Maintenance screen.

PF Key 11 - Next
This key will point to the next function - the capture of the next section in the budget or the final Budget Calculation process.

PF Key 12 - Calc
This key will calculate the section after the user has entered all the required fields. The user will be able to recalculate the section at any point in time before the budget is used.

Technical Note: When the calculate key is used, the system will calculate all of the lines in the section and set the calculated indicator on the section to (Y)es. Whenever a line is changed the calculated indicator on this section and other sections which follow in the budget section capture order must be reset to blank. This is because values can be carried over from one section to another.

PF Key 18 - Vrsn
This key will point to the Template Version Notes information.

PF Key 19 - Instructions
Any instructions for the section will be displayed. These instructions will have been captured when setting up the template and cannot be changed.

PF Key 20 - Capt
This key will toggle between the different methods of capturing the section (i.e. Short/Long version).

Processing

Each line will be set up according to the lines in the template section. The lines will be set up in line sequence number order. The description of the line will be set to the description of the template line. The line type will determine whether the frequency and amount will be captured by the worker or protected and calculated or accessed by the system. The worker will always be able to enter notes against a line. The worker will always be able to view the instructions of a line.

Two types of member level section capture will be available:

1. The full version where all the lines of the section will be displayed to the worker. Only some of these lines will require the amounts to be entered. The remaining lines will be set up or calculated by the system according to the rules of the template.
2. A shortened version of the section will be displayed showing the worker only those lines requiring the worker to enter the relevant amounts.

A toggle function key will be available to allow the worker to use either method of capture. The worker profile will be set up to default to the required capture method.

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The worker will be able to copy another section (from the same budget or another - but the budgets must be using the same template) into this one. Then the worker will be able to change the variable income and expense amounts that are different. The system calculated will be zeroed during the copy process and recalculated once all the user input amounts have been entered. The section that will be copied must be the same section as that being processed - from the same budget or a different one. If it is from a different one, the template versions of both budgets must be the same. The copy window will be activated by a function key. The window will request the worker to identify the following details:

1. Eligibility Determination from which to copy.
2. Budget from which to copy.
3. Budget Section Number from which to copy - will be the same section for the same member.

```
*Eligibility Determination Number : ___
*Budget Number                    : ___
*Budget Section Number                        : ___
```

The determination and budget will be defaulted to the determination and budget currently being calculated. Help will be available on determination number and budget number for the requested determination and budget.

The countable income will be calculated for each Member Calculation section. This amount will be available as a carried forward value to be used in the Eligibility Section. Once the countable income has been calculated, an indicator will be set to indicate to the Eligibility Section calculation that the Member Calculation Section is complete. If the Member Calculation Section is recalculated, this indicator must be reset. The Eligibility Section will not be calculated until all Member Calculation Sections have been processed.

There may be several lines that pertain to specific income amounts, e.g. PLI amount, OSS check amount. The lines that will include these amounts will be indicated accordingly in the template. For these lines, the values will be moved to specific amounts on the section so that they can be pulled from the budget at certification. The EIE information is also captured redundantly onto the Section from the lines for use in the Certification process. Other amounts may be marked with specific income types, e.g. UCB, VA. The template line will indicate when this occurs because the income type will be captured against the line. These amounts will then also be available to set up the person's income items during the certification process.

Technical Note: The Worker number and Supervisor number of the current user must be stamped on the budget whenever a modification is made.

Budget Spenddown Section Maintenance

```
 Message Line …
     BCAL                        *** M.E.D.SYSTEM ***                      *DATE
     MEBSECF                  BUDGET SECTION MAINTENANCE                   *TIME

 Action                : _ (C,D,M,N,L)
*CASE NUMBER           : _____________ ______________________________
*DETERMINATION NUMBER  : ____ Budget Date: MM/YYYY Status: ________
*BUDGET NUMBER         : ___ ___-___ ______ ____
*BUDGET SECTION NUMBER: __________ ____________________________________
 Section Notes         : ____________________________________________ +
 Excess Spenddown Amt  : ___________
    Date    Sub Seq     Description                   Amount      Balance  Nt
 __ /__ /____ ___ ____________________________ ____________ ____________  +
 __ /__ /____ ___ ____________________________ ____________ ____________  +
 __ /__ /____ ___ ____________________________ ____________ ____________  +
 __ /__ /____ ___ ____________________________ ____________ ____________  +
 __ /__ /____ ___ ____________________________ ____________ ____________  +
 __ /__ /____ ___ ____________________________ ____________ ____________  +
 __ /__ /____ ___ ____________________________ ____________ ____________  +
 __ /__ /____ ___ ____________________________ ____________ ____________  +
*Tran: ________ Act: _ Key: ____________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help  Main  Retn  Quit        Bdgt      Back  Fwrd  BMbr  BCal   Next
Calc
```

This screen will be displayed if the Section Type is ‘SD - Spenddown’. The template (type case) will indicate that a Spenddown section is available. The worker will have the option of entering medical bills for the eligibility determination via this screen.

The fields on the maintenance screen are described below:

Heading Fields

See Pretest Section Maintenance.

Spenddown Section Fields

Excess Spenddown Amount (N9.2)

The excess amount that will be used to Spenddown will be carried forward from the eligibility section. This amount will be used to subtract the medical bills from in order to determine which bills will be paid for.

Technical Note: Find the line in the budget that has a line value type of ‘E’. The value of the line is the excess spenddown amount.

Date (N8)

The date for the Spenddown expense. The date entered must be a valid date.

Date Sub Sequence (N2)

The sequence of bills within the same date. This is a mandatory field. Default value: 1. The worker can use this field to define the order in which to apply bills that have the same date.

Description (A30)

The description of the medical bill expense. This description could be the name of the doctor, pharmacy or description of the medical bill. This field is mandatory if the date is entered.

Amount (N9.2)

The amount of the medical bill. This field is mandatory if the date is entered.

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Balance (N9.2)
The balance left after reducing the excess spenddown amount by the medical bill expense. The system will calculate this field by taking the previous balance and subtracting the amount. The first balance will be calculated using the Excess Spenddown Amount.

Notes (A1)
Free format notes could be captured against the line item. This will provide the worker with an area to explain the line. The worker will enter a 'M' in this field to open a window to allow the capture of the notes.

Technical Note: The notes are an optional 'moreable' field. Display a pop-up window to allow maintenance of the notes.

Additional PF Keys

PF Key 6 -Bdgt
This key will point to the Budget Worksheet Maintenance function.

PF Key 9 - BMbr
This key will point to the Budget Member Maintenance screen.

PF Key 10 - BCal
This key will point to the Budget Calculation process - Eligibility section.

PF Key 11 - Next
This key will point to the next screen in the budget process - the capture of the next section.

PF Key 12 - Calc
This key will calculate the section after the user has entered all the required fields. The user will be able to recalculate the section at any point in time before the budget is used.

Technical Note: When the calculate key is used, the system will calculate all of the lines in the section and set the calculated indicator on the section to (Y)es. Whenever a line is changed the calculated indicator on this section and other sections which follow in the budget section capture order must be reset to blank. This is because values can be carried over from one section to another.

PF Key 19 - Instr
This key will display the instructions required to complete this section. The instructions will be captured when setting up the template and will not be modifiable here.

PF Key 20 - Capt
This key will toggle between the different methods of capturing the section (ie. Short/Long version).

Processing

These sections will be used for MNP Spenddown calculations.

The screen will be set up according to the lines in the template. The template will have been set up with the maximum allowable lines to be entered. The description will be defaulted to the template line description. The worker will be allowed to overwrite the description with a more meaningful or relevant description of the Medical Bill.

If the date is entered, the description and amount will be entered. The worker will always be able to enter notes against a line. The worker will always be able to view the instructions of a line.

The system will reorder the bills in ascending date order. The system will calculate the balance after each Amount. When 0 is reached, the bill that caused the zero will be highlighted.

Technical Note: Unlike the other section maintenance screens the spenddown section screen is built in date/date sub sequence order and NOT in line number order.

Technical Note: The Worker number and Supervisor number of the current user must be stamped on the budget whenever a modification is made.

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Budget Extended Medicaid Section Maintenance

```
Message Line …
    BCAL                    *** M.E.D.SYSTEM ***                        *DATE
    MEBSECF               BUDGET SECTION MAINTENANCE                    *TIME

 Action                  : _ (C,D,M,N,L)
*CASE NUMBER             : _____________ ______________________________
*DETERMINATION NUMBER    : ____ Budget Date: MM/YYYY Status: ________
*BUDGET NUMBER           : ___ ___-___ _______ ____
*BUDGET SECTION NUMBER   : __________ ___________________________________
 Section Notes           : ____________________________________________ +
 First COLA to Disregard : __ __ ____
 Year           Benefit       COLA %        COLA Amount     Notes
 ____        _____________    ____          _____________     +
 ____        _____________    ____          _____________     +
 ____        _____________    ____          _____________     +
 ____        _____________    ____          _____________     +
 ____        _____________    ____          _____________     +
 ____        _____________    ____          _____________     +
 ____        _____________    ____          _____________     +
 ____        _____________    ____          _____________     +

*Tran: ________ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help  Main  Retn  Quit  Copy  Bdgt  Back  Fwrd  BMbr  BCal   Next   Calc
```

This screen will be displayed if the Section Type is 'CO – Cola'. This screen will only be available for budgets attempting to remove the cost of living adjustments from the recipients' income in order to determine eligibility.

If the answer to question 17 – '*Does person have RSDI to disregard*' from the Person Month Income record for the member on the COLA section is (N)o the COLA section will be ignored as there is no need to calculate.

Technical Note: The COLA section will be created when the budget member is added and then depending on the answer to question 'Does person have RSDI to disregard?' the section will be deleted if answer is (N)o or created if answer (Y)es and the section does not already exist

The fields on the maintenance screen are described below:

Heading Fields

See Pretest Section Maintenance.

Extended Medicaid Section Fields

First COLA to Disregard (N8)

This is the year that the COLA line calculations are worked down to. This field will be display only and will be populated from the answer to question 16 – '*What is the month/year of the first COLA to disregard?* from Person Month Income record for the member on the COLA section.

Year (N4)

The year of the COLA %. The year will be set up from the corresponding line in the COLA section of the template. This will be an output only field.

Benefit (N9.2)

The benefit received by the member for the corresponding year. This field will be display only and will be populated from the answer to question number 14 – '*What is the person's RSDI amount?*

from Person Month Income record for the member on the COLA section. To determine which line to populate with this amount the answer to question number 15 – '*For which year is the RSDI Amount?* from Person Month Income record and match against the year on the lines as set up from the template.

COLA % (N2.1)
The COLA % which will be applied to the benefit to calculate the COLA Amount. This percentage will be set up from the corresponding line in the Extended Medicaid section of the template. This will be an output only field.

COLA Amount (N9.2)
The amount will be calculated by the system using the Benefit and the COLA %. COLA Amount calculation is Benefit (user) X COLA % (template) = subtotal. Next this subtotal amount is subtracted from the Benefit amount that gives a remainder that is the COLA Amount. This will be an output only field. This amount is carried over to the Benefit amount for the previous year.

Notes (A1)
Free format notes to be captured against the line item. The worker will enter a 'M' in this field to open a window to allow the capture of the notes.

Technical Note: The notes are an optional 'moreable' field. Display a pop-up window to allow maintenance of the notes.

Additional PF Keys

PF Key 5 - Copy
This key will allow the worker to copy another Extended Medicaid section into this one and then allow the amounts to be changed. The Extended Medicaid section being worked on may have more lines in the section because an additional COLA % has been added. The copying of the lines must ensure that the lines are matched according to the year of the benefit.

PF Key 6 -Bdgt
This key will point to the Budget Worksheet Maintenance function.

PF Key 6 -Bdgt
This key will point to the Budget Worksheet Maintenance function.

PF Key 9 - BMbr
This key will point to the Budget Member Maintenance screen.

PF Key 10 - BCal
This key will point to the Budget Calculation process - Eligibility section.

PF Key 11 - Next
This key will point to the next screen in the budget process - the capture of the next section.

PF Key 12 - Calc
This key will calculate the section after the user has entered all the required fields. The user will be able to recalculate the section at any point in time before the budget is used.

Technical Note: When the calculate key is used, the system will calculate all of the lines in the section and set the calculated indicator on the section to (Y)es. Whenever a line is changed the calculated indicator on this section and other sections which follow in the budget section capture order must be reset to blank. This is because values can be carried over from one section to another.

PF Key 18 - Vrsn
This key will point to the Template Version Notes information.

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PF Key 19 - Instr

This key will display the instructions required to complete this section. The instructions will be captured when setting up the template and will not be modifiable here.

PF Key 20 - Capt

This key will toggle between the different methods of capturing the section (i.e. Short/Long version).

Processing

These sections will be used for SSI calculations. An Extended Medicaid section will be provided by the system for each income unit member. If it is not applicable for any of the members, the worker will move on to the next screen.

The screen will be set up according to the lines in the template. The template will have been set up with the years in descending order with their corresponding COLA %'s. The budget lines will be set up with these details that the worker will not be allowed to change. The worker will, however be allowed to enter the amount of money received by the member in any particular year. The system will calculate the COLA amount by applying the COLA % to the benefit for each particular year.

The system will calculate a total of the COLA amounts. The total will be available as a carried forward amount to another section in the budget.

Technical Note: The Worker number and Supervisor number of the current user must be stamped on the budget whenever a modification is made.

Budget Eligibility Section Maintenance

```
 Message Line …
     BCAL                  *** M.E.D.SYSTEM ***                        *DATE
     MEBSECF            BUDGET SECTION MAINTENANCE                     *TIME

 Action                  : _ (C,D,M,N,L)
*CASE NUMBER             : _____________ ______________________________
*DETERMINATION NUMBER    : ____ Budget Date: MM/YYYY Status: ________
*BUDGET NUMBER           : ___ ___-___ ______ ____
*BUDGET SECTION NUMBER   : __________ ________________________________
 Section Notes           : ____________________________________________ +
 Go to Spenddown Next    : N (Y/N)                            Override
 LINE Description                         Amount   Nts Inst  Alwd Ind
 ____ ______________________________  ____________  +    +     _   _
 ____ ______________________________  ____________  +    +     _   _
 ____ ______________________________  ____________  +    +     _   _
 ____ ______________________________  ____________  +    +     _   _
 ____ ______________________________  ____________  +    +     _   _
 ____ ______________________________  ____________  +    +     _   _
 ____ ______________________________  ____________  +    +     _   _
 ____ ______________________________  ____________  +    +     _   _
 ____ ______________________________  ____________  +    +     _   _

*Tran: ________ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help  Main  Retn  Quit  BSec  Bdgt  Back  Fwrd  BMbr  Elig   Next   Calc
```

This screen will be displayed if the Section Type is ‘EL – Eligibility’. The eligibility section is usually the last section in a budget. This section will usually use the values calculated in previous sections to compare against a standard in order to determine eligibility. The decision, calculated by the system, will be displayed to the worker.

The fields on the maintenance screen are described below:

Heading Fields

See Pretest Section Maintenance.

Eligibility Section Fields

Go to Spenddown Next (A1)

This field is not stored in the database and it solely used as a navigation aid for budget section sequence capture. A ‘Y’ in this field in conjunction with the NEXT key will allow the user to go to the spenddown section after the eligibility section. This field is required when a spenddown section exists because the ‘Excess Spenddown Amt’ field is calculated on this section and is required on the spenddown section. After the user has calculated the spenddown section they then return to this section to calculate the sum of medical bills used which may affect the eligibility determination. Valid values are Y, N.

Default value to ‘Y’ if the following 2 conditions are all true:

1. The answer to Budget Question number 5, ‘*Are there medical bills available for Spend-down, if needed?*, is Y
2. Excess Spenddown Amount (amount of line with Line Value Type= E) on this eligibility section is greater than 0

otherwise default to ‘N’. Valid values are Y, N.

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Line (N4)
The line number within the sections. This number will correspond to the line number in the Template. This is a display only field.

Description (A30)
The description of the line. The description will be accessed from the template. Output only field.

Amount (N11.2)
The system calculated or user input amount. The system calculated amount will be result of the captured amounts, calculated by the system (value accessed from a table, value accessed from the template or value brought forward from other sections) or from user input and displayed to the worker. The template will dictate whether the amount is a 'user input' field or not.

Notes (A1)
Free format notes for the line. The worker will enter a 'M' in this field to open a window to allow the capture of the notes.

Technical Note: The notes are an optional 'moreable' field. Display a pop-up window to allow maintenance of the notes.

Inst (A1)
An instruction to the system to display the appropriate Template Line instructions. The worker will enter an 'M' to see a pop-up window with the instructions. The instructions will be display only.

Override Allowed Indicator (A1)
An indicator to say if the user is allowed to override the value of the calculated field. This field is display only.

Override Indicator (A1)
An indicator to say if the user actually has overridden the calculated value. This field is only available if an override is allowed. Valid values are (Y)es, (N)o. The user must enter (Y)es in this field if they want to override the system calculated value. If the user types over the system calculated value, but does not enter a (Y)es in this field the system will replace the user entered number with the system calculated value. The user can change the value of this field to (N)o to make the system re-calculate the field if they decide that the value they entered is incorrect.

Additional PF Keys

PF Key 5 -BSec
This key will point to the Budget Section Capture Screen.

PF Key 6 -Bdgt
This key will point to the Budget Worksheet Maintenance function.

PF Key 9 - BMbr
This key will point to the Budget Member Maintenance screen.

PF Key 10 – Elig
This key will point to the Eligibility Determination Maintenance screen.

PF Key 11 - Next
This key will point to the next screen in the budget process - the capture of the next section.

PF Key 12 - Calc
This key will calculate the section after the user has entered all the required fields. The user will be able to recalculate the section at any point in time before the budget is used.

Technical Note: When the calculate key is used, the system will calculate all of the lines in the section and set the calculated indicator on the section to (Y)es. Whenever a line is changed the calculated indicator on this section and other sections which follow in the budget section capture order must be reset to blank. This is because values can be carried over from one section to another.

PF Key 19 –Instr

This key will display the instructions required to complete this section. The instructions will be captured when setting up the template and will not be modifiable here.

PF Key 20 - Capt

This key will toggle between the different methods of capturing the section (i.e. Short/Long version).

Processing

Each line will be set up according to the rules of the template. The line type will determine whether the frequency and amount will be entered by the worker or protected and calculated by the system. The worker will always be able to enter notes against a line. The worker will always be able to view the instructions of a line.

The system will calculate the system calculated values when ENTER is pressed. The system will access other sections for any carried forward amounts to be totaled in this section. If any of these sections have not yet calculated the totals, the budget calculation will stop with a message to the worker to complete the processing of the erroneous section.

The final amount, upon which the eligibility will be based, will be kept as an attribute on the budget.

Additionally, a set of edits are used to determine if the AU Member is eligible for the budget.

For a CHAMP budget template the AU Member is ineligible:

- If they are born before Oct 1, 1983
- If they are 19 or older
- If they are 6 or older and the countable income is greater than 100% FPIG

  Refer analyst to LACHIP budget
- If they are under 6 and the countable income is greater than 133% FPIG

  Refer analyst to LACHIP budget

For a LACHIP budget template the AU Member is ineligible:

- If they are 19 or older
- If they are under 6 and the countable income is less than or equal to 133% FPIG

  Refer analyst to CHAMP budget
- If they are 6 or older and the countable income is less than or equal to 100% FPIG

  Refer analyst to CHAMP budget

For a LCHIP1 budget template the AU Member is ineligible:

- If they are 19 or older
- If they are under 6 and the countable income is less than or equal to 133% FPIG

  Refer analyst to CHAMP budget

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- If they are 6 or older and the countable income is less than or equal to 100% FPIG and they were born after Oct 1, 1983

  Refer analyst to CHAMP budget

For a LCHIP2 budget template the AU Member is ineligible:

- If they are 19 or older
- If they are under 6 and the countable income is less than or equal to 133% FPIG

  Refer analyst to CHAMP budget

- If they are 6 or older and the countable income is less than or equal to 133% FPIG

  Refer analyst to LCHIP1 budget

For a LCHIP3 budget template the AU Member is ineligible:

- If they are 19 or older
- If the countable income is less than or equal to 150% FPIG

  Refer analyst to LCHIP2 budget

For Champ, LCHIP, LCHIP1, LCHIP2, and LCHIP3 if more than one error message occurs, a pop-up box will be shown that displays all the messages at one time. If only one error message occurs, it will be displayed as usual at the top of the screen.

```
                              *** M.E.D SYSTEM ***                  08/15/05
MEBMSGN                 INELIGIBLE AU MEMBERS ON BUDGET             10:05:44
                                                                    METEST
Person Num    Name       Message
------------- ---------- -------------------------------------------------
1234567890123 MARY       ineligible for LACHIP - consider CHAMP
9876543210987 ROSE       ineligible for this budget









Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF
      Help        Retn                    Back  Fwrd
```

For a CHMPP2 budget template the AU Member is ineligible:

- If the countable income is less than or equal to 133% FPIG

  Refer analyst to CHMPP1 budget

For a CHMPW3 budget template the AU Member is ineligible:

- If the countable income is less than or equal to 133% FPIG and greater than 118% FPIG

  Refer analyst to CHMPW2 budget

- If the countable income is less than or equal to 118% FPIG

  Refer analyst to CHMPW1 budget

For a CHMPW2 budget template the AU Member is ineligible:

- If the countable income is less than or equal to 118% FPIG

  Refer analyst to CHMPW1 budget

Note: The determination of age is done by comparing the AU Member's birth month to the Budget month. AU Member's turning 19 in the budget month are considered eligible for that month.

When a budget is added for one of the MSP type cases and the budget outcome is eligible or ineligible, an online message will be provided to refer for QMB, SLMB or QI1 based on the income. If we refer to SLMB or QMB, the budget will remain in-progress and the analyst can delete it and can add a new budget for the suggested type-case. If we refer to QI1 or if we are busy with a SLMB and refer to a QMB, the message will be shown on the Determination Outcome pop-up. The analyst can agree with the outcome and the budget will be completed as ineligible or the analyst can disagree with the outcome in which case the budget will remain in-progress. The countable income is compared to the FPIG table as follows:

For a QMB budget template, refer to

- SLMB if Countable income is greater than100% FPIG but less than 120% FPIG
- QI1 if Countable income is greater or equal to 120% FPIG but less than 135% FPIG.

For a SLMB budget template, refer to

- QMB if countable income is less than or equal to 100% FPIG
- QI1 if Countable income is greater or equal to 120% FPIG but less than 135% FPIG

For a QI1 budget template, refer to

- QMB if countable income is less than or equal 100% FPIG
- SLMB if Countable income is greater than100% FPIG but less than 120% FPIG

The next step of the process is the confirmation of the system calculated budget determination. The budget must be confirmed, whether the assistance unit is eligible or not. A window will be displayed to allow the worker to indicate this confirmation. The worker will press ENTER to confirm the decision.

For Type Case 88 – Medicaid Purchase Plan the following window will be displayed:

```
                         ELIGIBILITY

      Determination Outcome: ELIGIBLE
      Confirm if correct   : _ (Y-yes/ N-no/ O-override)
      Monthly MPP Premium  : _____________
```

For LTC Type Cases the following window will be displayed:

```
                         ELIGIBILITY

      Determination Outcome: ELIGIBLE
      Confirm if correct   : _ (Y-yes/ N-no/ O-override)
      Monthly PLI Amount   : 604.12
      Partial PLI Amount   : 575.94
      Number of Elig Days  : 23
```


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For FOA Type Cases the following window will be displayed:

```
                          ELIGIBILITY

       Determination Outcome: ELIGIBLE
       Confirm if correct   :   (Y-yes / N-no / O-override
       FOA Premium          :
```

For all other Type Cases the following window will be displayed:

```
                          ELIGIBILITY

       Determination Outcome: ELIGIBLE
       Confirm if correct   : _ (Y-yes/ N-no/ O-override)
```

Fields

Determination Outcome (A10)

The Determination Outcome is 'Eligible' if the value of the line which contains the Final Eligible Amount is less than or equal to zero. The Determination Outcome is 'Ineligible' if the value of the line which contains the Final Eligible Amount is greater than zero. This field is display only.

Confirm if correct (A1)

This is an indicator to the system to go ahead an complete the budget. Valid values are (Y)es, (N)o and (O)verride. If (Y)es then the Budget Worksheet must be updated with the outcome and the budget status must be changed to 'complete'. If the outcome is ineligible the worker may choose to override the status to Eligible due to 12 months continuous eligibility. Override is not allowed if the type case is MNP or MNP Spenddown. If override is selected the following confirmation pop-up is displayed.

Monthly PLI Amount (N9.2)

This is the monthly PLI amount and will only be displayed for LTC/LTCMNP budgets if the outcome of the budget is eligible.

Partial PLI Amount (N9.2)

This is the partial PLI amount and will only be displayed for LTC/LTCMNP budgets if the outcome of the budget is eligible.

Number of Elig Days (N2)

This is the number of days the client is eligible for the partial PLI month.Monthly MPP Premium (N9.2)

This is the monthly MPP Premium and will only be displayed for MPP budgets if the outcome of the budget is eligible.

FOA Premium (N9.2)

This is the premium that needs to be paid under the Family Opportunites Act. It will only be displayed for FOA budgets if the outcome of the budget is eligible.

```
                        You have chosen to
                             override
                an Ineligible determination outcome.

        The override option is intended for certs that require at
               least 12 months of continuous eligibility.

        Press PF5 to Cancel       Press PF3 or Enter to continue
```

Once the budget is confirmed, the status of the budget will be changed to 'complete - to be checked' if there are no Post Eligibility sections in the template. A reminder will be sent to Workflow directed at the worker's supervisor to check the budget. If the worker does not need checking, the status of the budget will be changed to 'complete - to be decided' if there are no Post Eligibility sections in the template. The worker may not require checking but the category type case could force the supervisor to check the budget. The same processing (as above) will apply if the category type case specifies checking must take place.

If the outcome is confirmed as eligible and there are Post Eligibility sections, they will be calculated automatically by the system.

If the outcome is confirmed as ineligible, the user is not taken into any Post Eligibility sections. The budget can be completed when the user confirms an outcome of ineligible just like we already do for budgets without Post Eligibility sections.

Once eligibility has been determined the following final edits will be performed:

If the Type Case is a spenddown type case (check the field Medical Bills Required = Y on Type Case table) and the outcome is eligible and the spenddown section has no bills then this is an error with message Invalid Type Case - Spenddown budget not appropriate. The budget cannot be completed.

The system will generate a Post Eligibility Completion Section that must be completed when all of the Post Eligibility Sections have been completed by the worker.

Technical Note: The Worker number and Supervisor number of the current user must be stamped on the budget whenever a modification is made.

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Budget Post Eligibility Completion Section Maintenance

```
Message Line …
    BCAL                    *** M.E.D.SYSTEM ***                      *DATE
     MEBSECF              BUDGET SECTION MAINTENANCE                   *TIME

 Action                  : _ (C,D,M,N,L)
*CASE NUMBER             : _____________ ______________________________
*DETERMINATION NUMBER    : ____ Budget Date: MM/YYYY Status: ________
*BUDGET NUMBER           : ___ ___-___ ______ ____
*BUDGET SECTION NUMBER   : __________ ______________________________
 Section Notes           :

 Calculate to ensure all Post Eligibility sections are completed









*Tran: ________ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      Help  Main  Retn  Quit        Bdgt  Back  Fwrd  BMbr  Elig   Next   Calc
```

Heading Fields

See Pretest Section Maintenance.

Post Eligibility Completion Section Fields

Additional PF Keys

PF Key 6 -Bdgt
This key will point to the Budget Worksheet Maintenance function.

PF Key 9 - BMbr
This key will point to the Budget Member Maintenance screen.

PF Key 10 – Elig
This key will point to the Eligibility Determination Maintenance screen.

PF Key 11 - Next
This key will point to the next screen in the budget process - the capture of the next section.

PF Key 12 – Calc
This key will calculate the section after the user has entered all the required fields. The user will be able to recalculate the section at any point in time before the budget is used.

Technical Note: When the calculate key is used on this section, the system will check that none of the budget sections have their calculated indicators set to blank. If no sections are found to be uncalculated, the user will then be able to complete the budget.

PF Key 19 –Instr
This key will display the instructions required to complete this section. The instructions will be captured when setting up the template and will not be modifiable here.

PF Key 20 - Capt

This key will toggle between the different methods of capturing the section (ie. Short/Long version).

Processing Notes

If the user calculates this section the system will check that all the allocated post eligibility member calculation sections e.g. PLI section, have been completed and the status of the budget will be changed to 'waiting - to be checked'. A reminder will be sent to Workflow directed at the worker's supervisor to check the budget. If the worker does not need checking, the status of the budget will be changed to 'complete - to be decided'. The worker may not require checking but the category type case could force the supervisor to check the budget. The same processing (as above) will apply if the category type case specifies checking must take place.

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Budget Checking Process

Budgets to be Checked by Supervisor

```
 Message Line …
    BCHK                    *** M.E.D. SYSTEM ***                 *DATE
    MEBSCSQ          BUDGETS TO BE CHECKED BY SUPERVISOR          *TIME

                Det   Bud
 Case Number    Num   Num              Worker               Date    Elig
-------------  ----  ---  ------------------------------  -------  ----









*Supervisor Id: ________
*Tran: _______ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Main  Retn  Quit        Bdgt  Back  Fwrd
```

This function will display the budgets waiting to be checked by supervisor. A supervisor will see all budgets done by one or more workers for whom the supervisor is responsible. The supervisor can select a budget to be checked, from the list. Details of the budget will be displayed to the supervisor when PF6 is pressed.

The following information is displayed:

- Case Number
- Determination Number
- Budget Number
- Worker Name
- Determination Outcome

Additional PF Keys

PF Key 6 - Bdgt

This key points to the Budget Worksheet Maintenance Screen.

Budget Checking Function

```
Message Line …
    BDGT                    *** M.E.D. SYSTEM ***                *DATE
    MEBWRKF             BUDGET WORKSHEET MAINTENANCE             *TIME

*Action                  : _ (A,B,C,D,M,N,P,L)
*CASE NUMBER             : _____________
*DETERMINATION NUMBER    : ____
*BUDGET NUMBER           : ___
*Status                  : _                 Deter. Outcome :
*Type Case               : ___ ___
 Budget Date             : __ / ____ (MM/YYYY)
 Calculation Period      :              Number of Months : _ (1/2/3)
 Calculation Period From : __ / __ / ____ Calc Period To : __ / __ / ____
 Notes                   : ____________________________________________ +
 Budget in Error         : _ (Y/_)    Include EIE : _ (Y/N)
 Supervisor Check        : _ (G/B)
Copy from
*Determination Number    : ____
*Budget Number           : ___
 Section Selection       : N (Y/N)

*Tran: _______ Act: _ Key: ____________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Main  Retn  Quit  Elig  BMbr              BSec  BCal  Next  Vrsn
```

The budget checking will be controlled from the Budget Worksheet Maintenance Screen. The same functionality will be available even though it will be accessed from a different function on the Menu.

The following additional field is used for the Budget checking process:

Supervisor Check (A1)
: The supervisor's approval or rejection of the Budget. This is a mandatory field if it is displayed. Valid values are: (G)ood, (B)ad.

The above field is only displayed in the following circumstances:

- The Budget status is 'completed – waiting to be checked'.
- The user is the supervisor of the worker who completed the budget.

The supervisor will see the details of the budget selected from the Budgets To Be Checked by Supervisor Inquiry. The Action will be defaulted to 'M' (because the status of the budget will be modified. The supervisor will be required to enter a value in the Supervisor Check field - 'G' or 'B' (this will be the only field that the supervisor will need to enter). The system will use this value to change the status of the budget.

If 'Good', the status of the budget will be updated to 'approved - waiting for decision'. A workflow message will be sent to the worker to indicate that the budget has been checked successfully.

Technical Note: The checking required indicator must be reset when the supervisor approves the budget.

If 'Bad', the supervisor will receive a pop up that allows them to enter a reason for rejection (see below). If the supervisor presses the PF5 key to cancel, the budget status will remain in "Waiting" and no workflow will be sent. If the supervisor presses the PF3 key to continue, the budget status will be changed to "In Progress" and a workflow will be sent to the worker as a reminder to correct the budget. This workflow will include the rejection reason entered in the pop up to explain why the budget was rejected. If the supervisor does not enter a reason for rejection, and presses the PF3 key, an error will be shown asking them to enter a reason.

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```
Rejection Reason
_____________________________________

PF3 = Complete/Accept PF5 = Escape/Quit
```

The NEXT option will be available to drive the supervisor through the budget details before returning to this screen to make the Good or Bad decision. The budget detail screens will include the Budget Member Maintenance screens, the various types of Section Capture screens and the Eligibility Calculation screen (the same as for capturing a budget).

Select Alternate Worker Assignment

```
Message Line …
    WRKRQ                    *** M.E.D. SYSTEM ***                  *DATE
    MEAWRKQ            SELECT ALTERNATE WORKER ASSIGNMENT           *TIME

User ID  : MADDDD                                Assigned Location Type: P
User Name: DOE, STEVE                                     Location Id  : 8881
                                                          Worker Number: 1234
                                                          Supervisor Id: MESPL22
       Location Location Worker
Action   Type      ID    Number Supervisor Supervisor Name
------ -------- -------- ------ ---------- -----------------------------------
  _      P        8881    1234   MAUAAA    DOE, JOAN
  _      P        8882    5678   MAUXXX    DOE, RAY
                          ****** End of Data ******





*Tran: _______ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Main  Retn  Quit              Back  Fwrd
```

This function allows a user (with multiple Worker Numbers) to select an alternate Worker Number. This function will display all of the possible Worker Numbers that a user can select. The system automatically assigns a Worker Number at sign-on time. When a user wants to perform work that is recorded under a different Worker Number, the user is required to identify to the system the alternate Worker Number.

Signed On User

The following fields identify the user signed-on to the MEDS application.

User Id

The security user id. This is a display only field.

User Name

The user's name as defined in the security subsystem. This is a display only field.

Assigned Worker Number

The following fields identify the current system Worker Number assignment..

Location Type/Location Id

Identifies the worker's Parish. This is a display only field.

Worker Number

Unique identifier of a worker within a Parish. This is a display only field.

Supervisor Id

Security user id of the assigned worker’s supervisor. This is a display only field.

Action (A1)

The action code for this function is (S)elect.

Location Type/Location Id

The unique identifier of a Parish. This is a display only field.

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Worker Number
Unique identifier of a worker within a Parish. This is a display only field.

Supervisor
The security user id of the worker's supervisor. This is a display only field.

Supervisor Name
The supervisor's name as defined in the security subsystem. This is a display only field.

Processing

All Worker Numbers for the signed-on user are displayed. When a user selects an alternate Worker Number, the Worker Number know to the system is updated.

Technical Note: The system Worker Number for Budgets is stored as a Global along with the Supervisor Id

Budget Inquiries

```
Message Line …
    BIM                     *** M.E.D. SYSTEM ***                *DATE
    MEBBIQM                 BUDGET INQUIRIES MENU                *TIME

          Id Tran     Description
          -- -------  -------------------------------------------
           1 ELIGQC   Determinations by Case Inquiry
           2 BUDQ     Budgets by Case Inquiry
           3 BUDQI    Budgets in Progress Inquiry
           4 BUDQC    Budgets to be Checked Inquiry
           5 BUDSQ    Budget Section Inquiry
           6 BUDSDQ   Spenddown Bills by Case Inquiry









Id/*Tran: _______ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Main  Retn  Quit
```


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Determinations by Case Inquiry

```
Message Line …
    ELIGQC                  *** M.E.D. SYSTEM ***                 *DATE
    MEBDCSQ             DETERMINATIONS BY CASE INQUIRY            *TIME

Client:                                            SSN:

Deter   Determination    Determination
Number     Reason           Status
------ ---------------  ---------------









*Case Number: _____________ Determination Number: ____
*Tran: _______ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Main  Retn  Quit        Budq  Back  Fwrd
```

This function will display all the eligibility determinations for a case.

The following information for a Case is displayed:

- Client Name and SSN
- Determination Number
- Determination Reason
- Determination Status

Additional PF Keys

PF Key 6 - BUDQ
This key points to the Budget by Case Inquiry screen.

Processing

The latest determination will be shown first. If the cursor is placed on one of the determinations, the budgets for that determination will be displayed if PF 6 is pressed.

Technical Note: Use the Case Num / Elig Deter Num 9C superdescriptor on the Elig Det file.

Budgets by Case Inquiry

```
Message Line …
    BUDQ                    *** M.E.D. SYSTEM ***                 *DATE
    MEBBCSQ                BUDGETS BY CASE INQUIRY                *TIME

Client:                                          SSN:

Deter   Determination    Determination   Bud   Type        Budget
Number     Reason           Status       Num   Case        Status
------ ---------------  ---------------  ---  -------  ---------------









*Case Number: _____________ Determination Number: ____ Budget Number: ___
*Tran: _______ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Main  Retn  Quit        Bdgt  Back  Fwrd
```

This function will display all the budgets for a case.

The following information is displayed:

- Client Name and SSN
- Determination Number
- Determination Reason
- Determination Status
- Budget Number
- Type Case of Budget
- Budget Status

Additional PF Keys

PF Key 6 - Bdgt

This key points to the Budget Maintenance screen.

Processing

The latest determination will be shown first. If the cursor is placed on a line of the inquiry, the corresponding budget will be displayed if PF6 is pressed.

Technical Note: Use the Case Number / Determination Number 9C / Budget Number superdescriptor on the Budget Worksheet file.

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Budgets in Progress Inquiry

```
Message Line …
    BUDQI                    *** M.E.D. SYSTEM ***                  *DATE
    MEBBIPQ               BUDGETS IN PROGRESS INQUIRY               *TIME

Client:                                            SSN:

Deter   Determination   Bud   Type    Budget
Number     Reason       Num   Case     Date              Worker Name
------ ---------------  ---  -------  -------  ---------------------------------

*Case Number: _____________ Determination Number: ____ Budget Number: ___
*Tran: _______ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Main  Retn  Quit              Back  Fwrd
```

This function will display all the budgets that are **in progress** for a case.

The following information will be displayed:

- Client Name and SSN
- Determination Number
- Determination Reason
- Budget Number
- Type Case for the Budget
- Budget Date
- Worker Name

Processing

The latest determination will be shown first. The Case number is mandatory.

Technical Note: Use the Case Number / Determination Number 9C / Budget Number superdescriptor on the Budget Worksheet file. Ignore the records returned which do not have a status of 'in progress'.

Budgets to be Checked Inquiry

```
Message Line …
     BUDQC                    *** M.E.D. SYSTEM ***                  *DATE
     MEBBCKQ              BUDGETS TO BE CHECKED INQUIRY              *TIME

                Det   Determination  Bud  Type   Budget  Wrkr      Wrkr  Wrkr
  Case Number   Num      Reason      Num  Case    Date   Location  Num   Supvsr
 ------------- ---- --------------- --- ------- ------- --------- ---- --------









 *Case Number: _____________ Determination Number: ____ Budget Number: ___
 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit              Back  Fwrd
```

This function displays all the budgets waiting to be checked. This list is not restricted to a particular supervisor or a particular case. It is available for general use.

The following information is displayed:

- Case Number
- Determination Number
- Determination Reason
- Budget Number
- Type Case on the Budget
- Budget Date
- Worker Location Type and Location Id
- Worker Number
- Supervisor Number

Technical Note: Use the Checking Required Indicator / Case Number / Determination Number / Budget Number superdescriptor on the Budget Worksheet file.

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Budget Section Inquiry

```
Message Line …
      BUDSQ                  *** M.E.D. SYSTEM ***                 *DATE
      MEBBSCQ                BUDGET SECTION INQUIRY                *TIME

    Client Name     :                              SSN:
    Deter. Reason   :
    Budget Type Case:     -      Date:          Status:

                   Section Description                   Section Id   Notes
    -------------------------------------------------  ------------  -----






 *Case number: _____________ *Determination Number: ____ *Budget Number: ___
 *Tran: _______ Act: _ Key: ____________________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Help  Main  Retn  Quit              Back  Fwrd
```

This inquiry will display all of the sections captured for a budget with details of these sections.

The following information will be displayed:

- Client Name and SSN
- Determination Reason
- Budget Type Case
- Budget Date
- Budget Status
- Template Section Description
- Section Id
- Section Notes – this is a display only ‘moreable’ field.

Processing

The worker will enter the required details (Case, Determination and Budget) before the sections will be displayed.

Technical Note: Use the prime key on the Budget Section file.

Spenddown Bills by Case Inquiry

```
Message Line …
    BUDSDQ                  *** M.E.D. SYSTEM ***                  *DATE
    MEBSPDQ            SPENDDOWN BILLS BY CASE INQUIRY             *TIME

                                                          Det   Bud  Budget
 Bill Date          Bill Description            Amount    Num   Num   Date
 ----------  ------------------------------  ------------  ----  ---  -------









*Case Number: _____________ Starting Date: __ / __ / ____
*Tran: _______ Act: _ Key: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Main  Retn  Quit              Back  Fwrd
```

This function will display all medical bills that a case ever had.

The following information will be displayed:

- Spenddown Bill Date
- Spenddown Bill Description
- Spenddown Bill Amount
- Eligibility Determination Number
- Budget Number
- Budget Date

Processing

The worker will enter the case number. The system will show all bills for any Spenddown section captured for the case. The corresponding budget numbers will be displayed for a cross reference back to the relevant budget.

Technical Note: Use Case number/ MD date/MD sub seq superdescriptor on the Budget Wrksht Line file.

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Budget Report (MEN0040)

The budget report will include budget details as requested by the worker. The worker will provide selection criteria that will determine how the report is produced.

Selection Criteria:

1. Case Number, Decision number and budget number
2. Print complete budget (with notes & instructions)
3. Print budget without notes
4. Print budget without instructions
5. Print budget without notes and instructions
6. Print budget with final amounts only
7. Print budget with details of captured amount and final amounts

These selection criteria will be passed to the report module.

Technical Note: There will be one report module to produce the budget report for whatever selection criteria required.

This document will show the complete report layout. All information in Middle Case characters will be variable information accessed from the Template or the Budget. The highlighted items will be selective information, *i.e.* the worker can select not to show this information. The system will report on all sections in the budget. Some sections described below will not be valid for certain category type cases - in these cases, these sections will not be in the report. There will always be a first page describing the budget and a page describing the eligibility section. Report sections will be printed in the following order, assuming that a particular section exists for the requested Budget: Budget description, Pretest, Member Calc(s), Spenddown, COLA, Eligibility, Post-Eligibility(ies).

The Post Eligibility Completion Section will not be printed as this section is only required by the system and is not necessary in paper format.

A description of the template and the version being used for the budget will be shown on the bottom of every page of the report.

The PLI Amount and OSS Amount lines only appear in Post-Eligibility sections and only if the PE section uses PLI or OSS amounts.

Page 1: Budget Description

Report Layout

```
         1         2         3         4         5         6         7         8
12345678901234567890123456789012345678901234567890123456789012345678901234567890
MEBBRPR           LOUSIANA DEPARTMENT OF HEALTH AND HOSPITALS               Date
MEN0040                      BUDGET REPORT                                  Time
Job Number                                                               Page:  1

Cat-Type-Case Description
CASE: Case Number     Client Name                      SSN: 123-45-6789
DETERMINATION : Determination Number
BUDGET NUM    : Budget Number
CERT PERIOD   : Cert Period Start Date     CALCULATION PERIOD : Monthly/Quarterly

NOTES: Budget Notes
       Budget Notes
       Budget Notes
       Budget Notes

INSTRUCTIONS: Budget Instructions
              Budget Instructions
              Budget Instructions
              Budget Instructions
              Budget Instructions

                             *** End of Report ***
TMPLT: Template Id and Name                                VERSION: Template Ver
```


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Page 2: Member Calculation Section / Post Eligibility Section

Report Layout

```
         1         2         3         4         5         6         7         8
12345678901234567890123456789012345678901234567890123456789012345678901234567890
MEBBRPR           LOUSIANA DEPARTMENT OF HEALTH AND HOSPITALS               Date
MEN0040                      BUDGET REPORT                                  Time
Job Number                                                            Page:   1

Cat-Type-Case Description
CASE: Case Number     Client Name                       SSN: 123-45-6789
DETERMINATION : Determination Number
BUDGET NUM    : Budget Number
CERT PERIOD   : Cert Period Start Date

SECTION : Section ID – Section Name                    TYPE:  Section Type
MEMBER  : Member Name

NOTES   : Section Notes
          Section Notes
          Section Notes
          Section Notes
          Section Notes

INSTRUCTIONS : Instructions
               Instructions
               Instructions
               Instructions
               Instructions

Line Num  Line Description                             Amount
                     Captured Dates, Frequencies, and Amounts
                     Captured Dates, Frequencies, and Amounts
                                             Notes
                                             Notes
                                             Notes

Line Num  Line Description                             Amount
                     Captured Dates, Frequencies, and Amounts
                     Captured Dates, Frequencies, and Amounts
                                             Notes
                                             Notes
                                             Notes

PLI AMOUNT:                 PLI Amount (Note: only on PE sects)
OSS CHECK AMOUNT :    OSS Check Amount (Note: only on PE sects)

                              *** End of Report ***
TMPLT: Template Id and Name                              VERSION: Template Ver
```

Page 3: Eligibility Section

Report Layout

```
         1         2         3         4         5         6         7         8
12345678901234567890123456789012345678901234567890123456789012345678901234567890
MEBBRPR           LOUSIANA DEPARTMENT OF HEALTH AND HOSPITALS               Date
MEN0040                       BUDGET REPORT                                 Time
Job Number                                                            Page:  1

Cat-Type-Case Description
CASE: Case Number     Client Name                       SSN: 123-45-6789
DETERMINATION : Determination Number
BUDGET NUM    : Budget Number
CERT PERIOD   : Cert Period Start Date

SECTION : Section ID – Section Name                    TYPE:  EL-Eligibility


NOTES   : Section Notes
          Section Notes
          Section Notes
          Section Notes
          Section Notes

INSTRUCTIONS : Instructions
               Instructions
               Instructions
               Instructions
               Instructions


Line Num  Line Description                             Amount
                                            Notes
                                            Notes
                                            Notes

Line Num  Line Description                             Amount
                                            Notes
                                            Notes
                                            Notes

Line Num  Line Description                             Amount
                                            Notes
                                            Notes
                                            Notes

ELIGIBLE : Eligible/Ineligible

                             *** End of Report ***
TMPLT: Template Id and Name                                VERSION: Template Ver
```


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Page 4: Pretest Section

Report Layout

```
         1         2         3         4         5         6         7         8
12345678901234567890123456789012345678901234567890123456789012345678901234567890
MEBBRPR           LOUSIANA DEPARTMENT OF HEALTH AND HOSPITALS               Date
MEN0040                      BUDGET REPORT                                  Time
Job Number                                                            Page:   1

Cat-Type-Case Description
CASE: Case Number     Client Name                       SSN: 123-45-6789
DETERMINATION : Determination Number
BUDGET NUM    : Budget Number
CERT PERIOD   : Cert Period Start Date

SECTION : Section ID – Section Name                    TYPE:  PR-Pretest

NOTES   : Section Notes
          Section Notes
          Section Notes
          Section Notes
          Section Notes

INSTRUCTIONS : Instructions
               Instructions
               Instructions
               Instructions
               Instructions


Line Num  Line Description                             Amount
                                             Notes
                                             Notes
                                             Notes

Line Num  Line Description                             Amount
                                             Notes
                                             Notes
                                             Notes

Line Num  Line Description                             Amount
                                             Notes
                                             Notes
                                             Notes


                              *** End of Report ***
TMPLT: Template Id and Name                               VERSION: Template Ver
```

Page 5: Spenddown Section

Report Layout

```
         1         2         3         4         5         6         7         8
12345678901234567890123456789012345678901234567890123456789012345678901234567890
MEBBRPR           LOUSIANA DEPARTMENT OF HEALTH AND HOSPITALS            Date
MEN0040                       BUDGET REPORT                              Time
Job Number                                                            Page:

Cat-Type-Case Description
CASE: Case Number     Client Name                      SSN: 123-45-6789
DETERMINATION : Determination Number
BUDGET NUM    : Budget Number
CERT PERIOD   : Cert Period Start Date

SECTION : Section ID – Section Name                   TYPE:  SD-Spenddown

NOTES   : Section Notes
          Section Notes
          Section Notes
          Section Notes
          Section Notes

INSTRUCTIONS : Instructions
               Instructions
               Instructions
               Instructions
               Instructions

EXCESS SPENDDOWN AMOUNT:                              XS Amount

Date       Medical Bill Description    Amount        Balance
                                                 Notes
Date       Medical Bill Description    Amount        Balance
                                                 Notes
Date       Medical Bill Description    Amount        Balance
                                                 Notes
Date       Medical Bill Description    Amount        Balance
                                                 Notes
Date       Medical Bill Description    Amount        Balance
                                                 Notes
Date       Medical Bill Description    Amount        Balance
                                                 Notes
Date       Medical Bill Description    Amount        Balance
                                                 Notes
Date       Medical Bill Description    Amount        Balance
                                                 Notes
TOTAL:                                 Amount

                              *** End of Report ***
TMPLT: Template Id and Name                          VERSION: Template Ver
```


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Page 6: Extended Medicaid Section

Report Layout

```
         1         2         3         4         5         6         7         8
12345678901234567890123456789012345678901234567890123456789012345678901234567890
MEBBRPR           LOUSIANA DEPARTMENT OF HEALTH AND HOSPITALS               Date
MEN0040                       BUDGET REPORT                                 Time
Job Number                                                            Page:  1

Cat-Type-Case Description
CASE: Case Number     Client Name                       SSN: 123-45-6789
DETERMINATION : Determination Number
BUDGET NUM    : Budget Number
CERT PERIOD   : Cert Period Start Date

SECTION : Section ID – Section Name                    TYPE:  CO-Benft amt COLA%

NOTES   : Section Notes
          Section Notes
          Section Notes
          Section Notes
          Section Notes

INSTRUCTIONS : Instructions
               Instructions
               Instructions
               Instructions
               Instructions


Year  Benefit      COLA %  COLA Amount
                                   Notes
Year  Benefit      COLA %  COLA Amount
                                   Notes
Year  Benefit      COLA %  COLA Amount
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Year  Benefit      COLA %  COLA Amount
                                   Notes
Year  Benefit      COLA %  COLA Amount
                                   Notes
Year  Benefit      COLA %  COLA Amount
                                   Notes


TOTAL:                           Amount

                              *** End of Report ***
TMPLT: Template Id and Name                              VERSION: Template Ver
```


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For DHH