



WA444 INCORRECT IBU

The following scenarios demonstrate Individual Budget Units that the KEES Online Rules do not build correctly. When one of these situations is encountered, evaluate the case and determine if the incorrect IBU is causing an incorrect determination.

If the determination is the SAME (same program, same premium level) no action is needed to correct the IBU. If the incorrect IBU causes an incorrect determination, EDBC must be overridden to the correct eligibility outcome.

In both situations, log the correct IBU in the Journal.

These IBU scenarios no longer need to be reported to the KEES Help Desk. However, if you encounter an incorrect IBU that is not listed here, those should still be reported.

Non-Filer IBU for Adults

Rules are including Siblings and Stepsiblings under the age of 19 of the MEM.

Example: PA (age 20) is PW and applying for herself only. She also reports that her 2 minor siblings reside in the home with her. No taxes are being filed.

PA's IBU should = 2 (PA and the UB)
KEES will make the IBU = 4 (PA, UB, SB, SB)

Non-Filer IBU for Adults

Rules are including adult children of the MEM when they should only include children under the age of 19 if living in the home.

Example: PA, CH (age 20), CH (age 17)

PA's IBU should = 2 (PA, CH (age 17))
KEES will make the IBU = 3 (PA, CH (age 20), CH (age 17))

Tax Filer IBU

Rules will only include tax dependents in the primary tax filers IBU that wouldn't otherwise be included based on their relationship.

Example 1: PA, SP, CH, CH, NN – applying for the children only. PA and SP are married filing jointly and they claim both children and the NN.

CH's IBU should = 5 (PA, SP, CH, CH, NN)
KEES will make the IBU = 4 (PA, SP, CH, CH)

Example 2: PA, SP, CH, CH, SP's parents – applying for the children only. PA and SP are married filing jointly and they claim both children and both grandparents.

CH's IBU should = 6 (PA, SP, CH, CH, GP, GP)
KEES will make the IBU = 4 (PA, SP, CH, CH)

However, if the PA/SP were applying for benefits, their IBUs would be correct. KEES will only put the NN (or the grandparents) in the PA/SP's (or tax filer's) IBU.

Tax Filer IBU Exceptions

There are 3 tax filer exceptions – the second exception pertains to a child being claimed by only one parent, but living with both parents (biological or adopted). KEES Rules are adding step-parents in as well.

Example: PA and SP are married but filing separately. PA claims her 1 CH and SP claims his 2 CH (none of the children are mutual).

PA's CH's IBU should = 3 (PA, SP, CH)
KEES will make the IBU = 5 (PA, SP, CH, CH, CH)

Based on this example, no one meets any of the "exceptions". However, KEES thinks that they DO meet an exception because PA and SP are married filing separately, even though they have no mutual children. Because KEES thinks they meet an exception, they drop to non-filer rules.

IBU with SSI or LTC Recipient

Rules will not include as an FRI any SSI or LTC recipients.

Example: PA, CH, CH (SSI recipient)

CH's IBU should = 3 (PA, CH, CH (SSI recipient))

KEES will make the IBU = 2 (PA, CH)

Non-Parental Caretaker Relative

When non-parental caretaker relatives are requesting coverage, only the PA is considered the caretaker by KEES.

Example: PA, SP, GC – Applying for everyone.

Only the PA and GC will be potentially eligible. The SP will be denied for No Linkage to MA as he is not recognized as being a caretaker.

Non-Parental Caretaker Relative

When non-parental caretaker relatives are requesting coverage for only themselves, KEES will not see them as being caretakers.

Example: PA (age 20) and her 17 year old sibling. Only the PA is requesting coverage.

The PA will be denied for No Linkage to MA.

Document Change Log

Date	Version	Author	Change Description
12/09/2015	2.7	J. King	Initial draft completed

*Update version/date in document footer.