

KC-7004 Countable/Exempt Income Chart

The purpose of this chart is to provide policy guidance for eligibility staff with regard to which KEES income types are countable or exempt for both Family Medical and Elderly and Disabled Medical programs. The Income Categories and Income Types below are listed exactly as they appear in KEES and are only entered when income is received. Situations which require special processes to correctly count or exempt income are called out with an asterisk (*). This version is effective 07-01-2021.

| Income Category | Income Type | Family Medical | E & D | Comments |
|-----------------------|--------------------------|---------------------------------|------------|--|
| Annuities/Trusts | Annuity Income | Must be evaluated to determine. | | Send to Policy for evaluation. |
| | Trust Income | | | |
| Child/Spousal Support | Child Support-Current | Exempt | Exempt* | *Countable only for non-students 18 and over, students 22 and over, and institutionalized children of any age. For all others, enter as Miscellaneous: Other - Exempt. Refer to Medical KEESM 6410(11)(c). |
| | Child Support-Arrearages | Exempt | Exempt* | *Countable if the arrearage is received for a child 18 or over. Enter as Miscellaneous: Other – Countable. Refer to Medical KEESM 6410(11)(a). |
| | Spousal Support | Exempt* | Exempt | *Exempt for divorce agreements made or modified after December 31, 2018. Otherwise it will be countable for MAGI programs. |
| | Voluntary Payments | Exempt | Countable* | *For E&D Medical, Voluntary Payments should be treated as Current Child Support. |

| Income Category | Income Type | Family Medical | E & D | Comments |
|-----------------|---|----------------|-----------|--|
| Contract Sales | Contract Sales | Countable | Countable | |
| Disability | Disability - Expected to return to work | Exempt | Countable | This includes disability related income received as the result of being on maternity leave. |
| | Disability - Not Expected to return to work | Exempt | Countable | |
| | Worker's Comp - Expected to return to work | Exempt | Countable | Not required to determine if individuals plan to return to work. |
| | Worker's Comp - Not Expected to return to work | Exempt | Countable | |
| Earnings | Blood/Plasma | Exempt | Countable | |
| | Bonus, Commission, Tips | Countable | Countable | |
| | Overtime | Countable | Countable | |
| | Seasonal Employment | Countable | Countable | |
| | Strike Pay | Exempt | Exempt | |
| | Wages | Countable | Countable | This includes wages received while on maternity leave (including vacation or sick pay usage). |
| Education | Educational Student (Used for living expenses) | Exempt | Exempt | This includes grants, scholarships, loans, Veteran's educational income, income received from the GI Bill, and monthly living benefits (stipends). |
| | Educational, Student | Exempt | Exempt | |
| | Discharged, forgiven, or cancelled student loan debt on or after January 1, 2021 | Exempt* | Exempt | *Countable if discharge/forgiveness occurred prior to January 1, 2021. Cancelled student loan debt would be treated as lump sum income. |
| | Student loan debt that is discharged, forgiven, or cancelled due to death or disability between January 1, 2018 and December 31, 2020 | Exempt | Exempt | |

| Income Category | Income Type | Family Medical | E & D | Comments |
|--|--|----------------|-----------------|---|
| Government Payments | Adoption Assistance Subsidy | Exempt | Exempt | |
| | Cash Assistance | Exempt | Exempt | |
| | Disaster/Emergency Assistance | Exempt | Exempt | |
| | Executive Volunteer Programs-SCORE and ACE | Exempt | Exempt | |
| | Foster Care and Permanent Custodianship | Exempt | Exempt | |
| | Foster Grandparents/Senior Volunteers | Exempt | Exempt | |
| | Gate Money | Exempt | Exempt | |
| | HUD Payments | Exempt | Exempt | |
| | Independent Living | Exempt | Exempt | |
| | Older American Act Payments | Exempt | Exempt | |
| | Refugee Resettlement Funds | Exempt | Exempt | |
| | Senior Health Aides/Companions | Exempt | Exempt | |
| Tax Refunds/Rebates/Credits (EITC) | Exempt | Exempt | | |
| Insurance, Legal Settlement, Third Party | Life Insurance and Burial Proceeds, Death Benefits | Exempt | Exempt | |
| | Other Recurring Insurance Payments, non-exempt | Countable | Countable | |
| | Payments for Repair or Replacement of Property | Exempt | Exempt | |
| Interest, Dividends, Investments | Dividends | Countable | Count if > \$50 | |
| | Interest | Countable | Count if > \$50 | For E&D Medical, total interest received in the month from any and all accounts(s)/source(s) is countable if greater than \$50. |
| | Interest on Burial Fund | Exempt | Exempt | |
| | Life Insurance Dividends | Exempt | Exempt | |

| Income Category | Income Type | Family Medical | E & D | Comments |
|-----------------------------|--|----------------|----------------------------|--|
| Loans, Gifts, Contributions | Regular Cash Gifts > \$50 | Exempt | Countable | |
| | Regular Cash Gifts <= \$50 | | Countable* | *Must be entered in KEES as Miscellaneous: Other – Countable. |
| | Irregular Cash Gifts > \$50 | | Countable | |
| | Irregular Cash Gifts <= \$50 | | Exempt | |
| | Deemed Sponsor Income | Exempt | Countable | |
| | Loans which must be repaid | Exempt | Exempt | |
| | Military Allotments | Exempt | Countable | |
| Miscellaneous | Allocated Income | Exempt | Countable | This income is only countable for the community spouse. |
| | Lottery/Gambling Winnings | Countable | Countable | Special rules are used to calculate – refer to KFMAM 5220.06. |
| | Other- Countable | Countable | Countable | For E&D Medical, this includes ministerial housing allowance and promissory notes. |
| | Other- Exempt | Exempt | Exempt | This includes Hostile fire pay (combat pay) received while in active military service. See KFMAM 5436 and Medical KEESM 6410(30). For Family Medical, this includes ministerial housing allowance. See KFMAM 5441. |
| | Vendor Payments/Diverted Income | Exempt | Exempt | |
| | Monies Withheld to Recover Overpayment | Exempt | Exempt | |
| Native American | Bureau Indian Affairs Income | Exempt | Exempt | |
| | Indian Claims/Resettlement | Exempt | Exempt | |
| | Native American- Payments from Leases or Trusts of Individually or Tribal Owned Land | Exempt | Count if > \$2000 annually | |

| Income Category | Income Type | Family Medical | E & D | Comments |
|----------------------------------|---|----------------|-----------|---|
| Native American | Native American Tribal Disbursements (includes casino profits) | Countable | Countable | Income from gaming is COUNTABLE. All per capita income received by Kansas tribe members is from gaming. Non- Kansas tribes will require additional research. |
| Oil Royalties/ Mineral Rights | Oil Royalties/Mineral Rights | Countable | Countable | |
| Railroad | Railroad Benefits | Countable | Countable | |
| Reimbursements | Reimbursements or Refunds | Exempt | Exempt | Health Saving Account (HSA) Reimbursements are exempt for all programs. |
| Retirement, Pensions | KPERS | Countable | Countable | |
| | Pensions/Other Retirement | Countable | Countable | |
| Self-Employment | Rental Income- Manages Property Less Than 20 Hours/Week | Countable | Countable | For Rental Income, it is not relevant whether they work at least 20 hours per week or not. If the individual is actively involved in the business, the income is "earned" and the "at least 20 hours" option is used. If the individual is not actively involved, the income is unearned and the "less than 20 hours" option is used. |
| | Rental Income- Manages Property at Least 20 Hours/Week | Countable | Countable | |
| | Self-Employment | Countable | Countable | |
| Social Security | SSI | Exempt | Exempt | Countable for Institutional Care patient liability if amount exceeds \$30 and is not anticipated to be reduced. |
| | Social Security | Countable | Countable | |

| Income Category | Income Type | Family Medical | E & D | Comments |
|---------------------------|---|----------------|--------------------------------|--|
| Unemployment | Unemployment | Countable | Countable | |
| Veterans | Reduced VA Pension LTC | Exempt | Exempt | Amount is always \$90. All other amounts are other forms of VA income. |
| | Unusual Medical Expenses (UME) | Exempt | Exempt | |
| | VA Compensated Work Therapy | Exempt | Countable | |
| | VA Monthly Housing Allowance | Exempt | Countable | |
| | Veterans Aid and Attendance | Exempt | Exempt* | *Countable for NF <u>only</u> unless reduced, then enter as Reduced VA Pension LTC. |
| | Veterans Disability | Exempt | Countable | |
| | Veterans Pension | Exempt* | Countable | *For Family Medical, code as Veterans Disability in KEES and add a note within the record stating the source as Veteran's Pension. |
| Work Program/ Training | AmeriCorps/VISTA | Countable | Exempt | |
| | College work study | Countable | Exempt | |
| | Job Corps | Countable | Exempt | |
| | VR Training Allowance/Incentive Maintenance | Exempt | Countable | |
| | WIA - Earned | Countable | Countable for age 19 and older | |
| | WIA - Incentive or Training Allowance | Exempt | Exempt | |