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April 28, 1995

MEDI-CAL ELIGIBILITY PROCEDURES MANUAL LETTER NO.: 143

TO: All Holders of the Medi-Cal Eligibility Procedures Manual

Enclosed are revisions to the Medi-Cal Eligibility Procedures Manual for Article 8D--Medi-Cal Family Budget Unit (MFBU)--Caretaker Relatives.

Procedure RevisionDescription

Article 8D

MFBU Determination - Caretaker Relatives --  
Revised to include more examples of when a caretaker  
has a choice in his/her linkage.Filing InstructionsRemove PagesInsert Pages

8D-1 through 8D-4

8D-1 through 8D-4

If you have any questions concerning a specific revision, please contact Marge Buzdas of my staff (916) 657-0726.

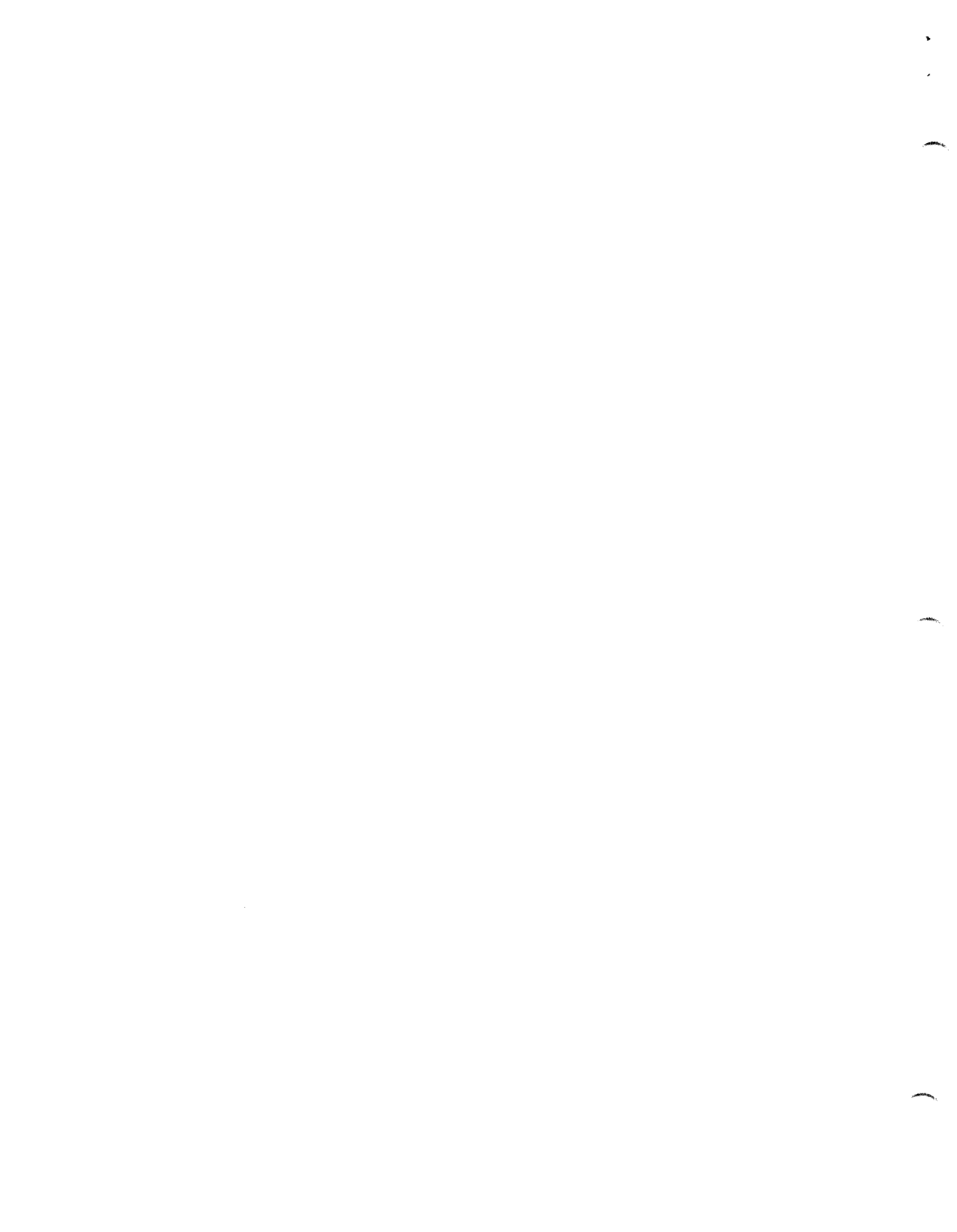
Sincerely,

Original signed by  
Glenda Arellano for

A handwritten signature in cursive script, appearing to read "for", positioned above the typed name of Frank S. Martucci.

Frank S. Martucci, Chief  
Medi-Cal Eligibility Branch

Enclosure



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## MEDI-CAL ELIGIBILITY PROCEDURES MANUAL

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### 8D--MFBU DETERMINATIONS-CARETAKER RELATIVES

#### Family Members Living in the Home Who are not PA or Other PA

#### MFBU Composition

##### EXAMPLE 1

Grandmother requests Medi-Cal for herself and her grandchildren (siblings or half siblings). The grandfather and their children also live in the home. The grandfather has no linkage and does not wish Medi-Cal nor do their own children.

##### Household

Caretaker grandmother; related children;  
caretaker's spouse; their own children.

##### MFBU(s)

1 MFBU

a) Caretaker; related children

##### EXAMPLE 2

Grandmother requests Medi-Cal for herself, her grandchildren (siblings or half siblings), her spouse, and her own children, none of whom are the grandchildren's parent(s). The grandfather and their children live in the home. The grandfather has no linkage. The grandmother has no basis for linkage except as a nonparent caretaker relative to her grandchildren.

##### Household

Caretaker grandmother; related children;  
caretaker's spouse; their own children

##### MFBU(s)

2 MFBU(s)

a) Caretaker; related children

b) Caretaker and caretaker's spouse as  
ineligible members; their own eligible children.

##### EXAMPLE 3

Aunt requests Medi-Cal for herself, her sister's children (siblings or half siblings), and her spouse who is aged. They have no children of their own in the home. The aunt has no basis for linkage except as a nonparent caretaker relative to her nieces and nephews.

##### Household

Caretaker aunt; related children;  
caretaker's spouse.

##### MFBU(s)

2 MFBU(s):

a) Caretaker; related children

b) Caretaker as ineligible member. Caretaker's  
spouse (aged).

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## MEDI-CAL ELIGIBILITY PROCEDURES MANUAL

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### EXAMPLE 4

Grandmother requests Medi-Cal for herself, her grandchild, and her sister's children. She has no spouse or children of her own living in the home.

#### Household

Caretaker grandmother; related children  
(some who are not siblings or half  
siblings)

#### MFBU(s)

2 MFBU(s):

- a) Related child (grandchild)
- b) Related children (niece, nephew); caretaker.

or

- a) Related child (grandchild); caretaker
- b) Related children (niece, nephew).

Caretaker may choose either/any MFBU. Children who are not siblings or half siblings must be in their own MFBU.

### Example 5

Grandmother requests Medi-Cal for herself and her grandchild. She is 65 years old and chooses not to be aided as an aged person. She has no income. Her spouse does not wish to be aided.

#### Household

Caretaker grandmother, related child  
Caretaker's spouse

#### MFBU

1 MFBU

- a) Caretaker; related child

### Example 6

Grandfather requests Medi-Cal for himself, his minor child, and his nephew. His minor child has no other parent in the home. The grandfather may choose to be linked to either his nephew or his minor children; however, his income and resources must be included when determining the eligibility of his children.

#### Household

Caretaker grandfather, related child  
Caretaker's child

#### MFBU

2 MFBU(s)

- a) Caretaker; related child
- b) Caretaker as an ineligible member;  
caretaker's child.

or

- a) Related child
- b) Caretaker and his child.

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## MEDI-CAL ELIGIBILITY PROCEDURES MANUAL

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### Family Members Living in the Home Who are PA or Other PA

### MFBU Composition

#### Example 7

#### MFBU(s)

Uncle, his brother's daughters (siblings or half siblings), his wife and their own children request Medi-Cal. His wife is incapacitated. Nieces are SSI recipients.

#### Household

#### MFBU(s)

Caretaker uncle, related children on PA; caretaker's spouse; their own children

1 MFBU:

Caretaker; spouse; their own children.

#### Example 8

Uncle, his brother's daughters (siblings or half siblings), his pregnant wife and their own children request Medi-Cal. Nieces are SSI recipients. Uncle has no linkage except to nieces.

#### Household

#### MFBU(s)

Caretaker uncle, related children on PA; caretaker's spouse; their own children.

2 MFBU(s);

a) Caretaker;

b) Caretaker as ineligible member; wife; unborn; other mutual children.

#### Example 9

#### MFBU(s)

Grandmother requests Medi-Cal for herself and her grandchildren (siblings or half siblings). The grandfather receives SSI because he is aged and lives in the home.

#### Household

#### MFBU(s)

Caretaker grandmother; related children; caretaker's spouse on PA

1 MFBU:

Caretaker; related children.

#### Example 10

Grandmother requests Medi-Cal for herself, her grandchildren (siblings or half siblings), and her own children, none of whom are the grandchildren's parents. The grandfather receives SSI because he is aged. The grandparents's children are medically indigent; the grandmother's only linkage would be as the nonparent caretaker relative of her grandchildren.

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## MEDI-CAL ELIGIBILITY PROCEDURES MANUAL

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### Household

Caretaker grandmother; related children; caretaker's spouse on PA; their own children.

### MFBU(s)

2 MFBU(s);

- a) Caretaker; related children
- b) Caretaker as ineligible member; her own children.

### Example 11

Grandmother requests Medi-Cal for herself but not for her spouse. Her grandchild lives in the house and receives AFDC foster care based Medi-Cal. Grandmother is over 65 but chooses to be aided linked to her grandchild.

### Household

Caretaker grandmother; related child on PA caretaker's spouse.

### MFBU

Caretaker

### Treatment of Income and Property

In households where there is an MFBU which contains a caretaker relative and related children and the spouse or children of the caretaker either do not wish Medi-Cal or receive public assistance (PA) or other PA and do not appear in any MFBU, no income or property allocation is made to either the spouse or the caretaker's own children by the caretaker or vice versa.

If the caretaker relative is in two MFBUs, consider the caretaker relative's full income in both and allow his/her medical expenses to be used to meet the share of cost in both MFBUs as specified in Section 50379.

If an MFBU which contains a caretaker relative and related children has excess property or a share of cost, follow existing Sneede v. Kizer procedures.