Household Size Flow Chart

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

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

START HERE

1. Does the individual expect to file a federal tax return for the taxable year?
   - NO
   - YES

   2. Does the individual expect to be claimed as a tax dependent by a taxfiler for the taxable year?
      - NO
      - YES

   3. Does the individual expect to be claimed as a tax dependent by another taxfiler for the taxable year?
      - NO
      - YES

   4. Is the tax dependent:
      - NO
      - YES

      1. Someone other than the spouse or child (biological, adopted, or step; minor or adult) of the taxfiler.
      2. Under the age of 19 or under 21 if a full time student who expects to be claimed as a tax dependent and is living with both parents but whose parents do not expect to file a joint tax return.
      3. Under age 19 or under age 21 if full time student and the taxfiler is the individual’s non-custodial parent.

      If YES to 1, 2, or 3, then go to YES. If NO to all, then go to NO

   5. Is the individual married?
      - NO
      - YES

   6. Are the individual and spouse living apart and filing separately?
      - NO
      - YES

   7. Is the individual pregnant?
      - NO
      - YES

   8. Are any people who are included in the individual’s household composition pregnant (not counting the individual)?
      - NO
      - YES

   -- Stop --
   - No Additional Changes
   - Add number of children expected to the Household size for each pregnant person.

**Actions to calculate Household Size**

1. **Decisions to identify correct Actions**

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

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

<table>
<thead>
<tr>
<th>#</th>
<th>Household Member</th>
<th>Tax Filer?</th>
<th>Tax Dpdnt of #</th>
<th>Excep 1? **</th>
<th>Excep 2? **</th>
<th>Excep 3? **</th>
<th>Married to #</th>
<th>Living with #’s</th>
<th>Filing with #</th>
<th>Pregnant?</th>
<th>Resultant HH Members (#’s)</th>
<th>HH Size</th>
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<tbody>
<tr>
<td>1</td>
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**Exceptions Defined:**
1. Someone other than the spouse or child (biological, adopted, or step; minor or adult) of the taxpayer.
2. Under the age of 19 or under 21 if a full time student who expects to be claimed as a tax dependent and is living with both parents but whose parents do not expect to file a joint tax return.
3. Under age 19 or under age 21 if full time student and the taxpayer is the individual’s non-custodial parent.
Household Diagram Worksheets

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