



# DHCS Guide for Calculating MAGI Medi-Cal Individual Household Size

## 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

Go to #1

**#1 - Does the individual expect to file a federal tax return for the taxable year?**

**If No Go to #2**

**If Yes Go to #3**

**#2 - Does the individual expect to be claimed as a tax dependent by a taxfiler for the taxable year? If No**

**Go to Box C, NonFiler Rules then to #7**

**If Yes Go to #4**

**#3 - Does the individual expect to be claimed as a tax dependent by another taxfiler for the taxable year?**

**If No Go to Box A, TaxFiler Rules, then to #5**

**If Yes Go to #4**

**#4 - Is the tax dependent:**

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 No to all three, Go to Box B, Tax Dependent Rules then to #5**

**If Yes to any of the above, Go to Box C, Non-Filer Rules, then to #7**



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**Box A, TaxFiler Rules – \* Household size consists of the individual and all persons whom such individual expects to claim as a tax dependent.**

**\*Household size = Total number of persons counted in household composition.**

**Box B, Tax Dependent Rules - \* Household size consists of individual and the taxfiler and all other persons whom the taxfiler expects to claim as a tax dependent.**

**\* Household size = Total number of persons counted**

**Box C, Non-Filer Rules - Household size consists of the individual plus the following people living with the individual:**

- Individual's spouse;
- Individual's children under age 19 (natural, adopted and step), or if full-time student, under age 21;
- For individuals under age 19, or if full-time student, under age 21:
  - Individual's parents (natural, adopted and step); and
  - Individual's siblings under age 19 (natural, adopted and step), or if full-time student, under age 21

**Household size = 1 + total number of people listed above living with the individual.**

**#5 - Is the individual married?**

**If No Go to #7**

**If Yes Go to #6**

**#6 - Are the individual and spouse living apart and filing separately?**

**If No Add spouse to household size**

**If Yes Go to #7**



## DHCS Guide for Calculating MAGI Medi-Cal Individual Household Size

**#7 - Is the individual pregnant?**

**If No Go to #8**

**If Yes Add number of children expected to Household size**

**#8 - Are any people who are included in the individual's household composition pregnant (not counting the individual)?**

**If No -- Stop --No Additional Changes**

**If Yes Add Number of Children Expected to the Household size for each pregnant person.**

**\* 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**



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## 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 arrive at a resultant Household Member Set and Family Size in the last column of the table

#	Household Member	Tax Filer?	Tax Dpdnt of #	Excep 1? **	Excep 2? **	Excep 3? **	Married to #	Living with #'s	Filing with #	Pregnant?	Resultant HH Members (#'s)	HH Size
1		Y / N		Y / N	Y / N	Y / N				Y / N		
2		Y / N		Y / N	Y / N	Y / N				Y / N		
3		Y / N		Y / N	Y / N	Y / N				Y / N		
4		Y / N		Y / N	Y / N	Y / N				Y / N		
5		Y / N		Y / N	Y / N	Y / N				Y / N		
6		Y / N		Y / N	Y / N	Y / N				Y / N		
7		Y / N		Y / N	Y / N	Y / N				Y / N		
8		Y / N		Y / N	Y / N	Y / N				Y / N		
9		Y / N		Y / N	Y / N	Y / N				Y / N		
10		Y / N		Y / N	Y / N	Y / N				Y / N		

### \*\* Exceptions Defined:

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.



## 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.

<b>Application Household Diagram</b>	_____ <b>Tax filer Household Diagram</b>	_____ <b>Individual Household Diagram</b>
_____ <b>Individual Household Diagram</b>	_____ <b>Individual Household Diagram</b>	_____ <b>Individual Household Diagram</b>
_____ <b>Individual Household Diagram</b>	_____ <b>Individual Household Diagram</b>	_____ <b>Individual Household Diagram</b>