



STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

STATE: MONTANA

MORE LIBERAL METHODS OF TREATING RESOURCES  
UNDER SECTION 1902 (r) (2) OF THE ACT

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Section 1902 (f) State

Non-Section 1902(f) State

1902(r)(2) of the Act      Consideration of more liberal resource policies under 1902(r)(2) are being applied to determine medical assistance eligibility.

X For all groups, exclude the value of the first resource purchased with excluded Native American funds, as long as the purchase is clearly identifiable as being made with excluded funds. This would include the first transfer of excluded funds into a non-excluded account, so long as the excluded funds remained clearly identifiable.

These groups include those in sections 1902(a)(10)(A)(i)(III); 1902(a)(10)(A)(i)(IV); 1905 (p); 1902(a)(10)(A)(ii)(I); 1902(a)(10)(A)(ii)(II); 1902(a)(10)(A)(ii)(III); 1902(a)(10)(A)(ii)(IV); 1902(a)(10)(A)(ii)(IX); 1902(a)(10)(A)(ii)(XVII); and 1902(a)(10)(C)(i)(III) of the Act.

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ELIGIBILITY UNDER SECTION 1931 OF THE ACT

2. One vehicle is excluded regardless of value. Additional vehicles are excluded if income producing (equity value of all remaining vehicles is counted).
3. Cash value of any life insurance policy is excluded from resources.
4. The first \$200 of each earner's earned income, plus 25% of each earner's remaining earned income, plus dependent care expenses up to \$200 per month per dependent is excluded without time limitation.
5. Earned or unearned income of an individual who is legally obligated to pay child support to non-household members is excluded to the extent the income is used to pay that support.
6. Earned income of a dependent child who is attending school is excluded.
7. All grants, loans and scholarships directly related to the individual attending an institution of higher education/training are excluded as income and resources.
8. Gifts of \$50 or less per month per family member are excluded from income.
9. All wages paid by the Census Bureau for temporary employment related to decennial Census activities are excluded.
10. Exclude the value of the first resource purchased with excluded Native American funds, as long as the purchase is clearly identifiable as being made with excluded funds. This would include the first transfer of excluded funds into a non-excluded account, so long as the excluded funds remained clearly identifiable.

The income and/or resource methodologies that the less restrictive methodologies replace are as follows:

1. \$1000 of resources were excluded.
2. Up to \$1500 equity value of one vehicle was excluded. Equity value in excess of \$1500 was applied to the allowable resource standard. Equity value of all other vehicles was counted.
3. Cash value of life insurance counted toward the allowable resource standard.
4. \$90 standard work expense, plus \$30 and 1/3\*, plus dependent care (up to \$175 per month per child for children over age two, and \$200 per month per child for children under age two.) \*1/3 disregard allowed for only 4 consecutive months, then not available again until the family has gone 12 consecutive months without an AFDC grant. The \$30 disregard continued for 8 months beyond the initial 4 consecutive months. These were allowed only if specific tests were passed.
5. Previously this income was countable.
6. Earned income of a dependent child who was a full or part-time student, but was not a full-time employee was excluded.
7. Title IV grants were excluded for undergraduates. Other grants minus expenses directly related to attending the educational institution (i.e., fees, books, tuition, etc.) were