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Citation(s)

Condition or Requirement

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\_\_\_ For optional State supplement recipients in section 1902(f) States and SSI criteria States without section 1616 or 1634 agreements—

\_\_\_ SSI methods only

\_\_\_ SSI methods and/or any more liberal methods than SSI described in Supplement 8a to ATTACHMENT 2.6-A

\_\_\_ Methods more restrictive and/or more liberal than SSI, except for aged and disabled individuals described in section 1902 (m) (1) of the Act. More restrictive methods are described in Supplement 4 to ATTACHMENT 2.6-A and more liberal methods are specified in Supplement 8a to ATTACHMENT 2.6-A.

In determining relative financial responsibility, the agency considers only the income of spouses living in the same household as available to spouse and the income of parents as available to children living with parents until the children become 21.

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TN No. 13-012  
Supersedes  
TN. No. 91-22

Approval Date 5/30/14

Effective Date June 1, 2014

STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

State: INDIANA

ELIGIBILITY CONDITIONS AND REQUIREMENTS

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Citation

Condition or Requirement

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1902 (l)(3)(E)  
and 1902(r)(2)  
of the Act

e. Poverty level pregnant women, infants, and children. For pregnant women and infants or children covered under the provisions of section 1902(a)(10)(A)(i)(IV), (VI), and (VII), and 1902(a)(10)(A)(ii)(IX) of the Act --

(1) The following methods are used in determining countable income:

The methods of the State's approved AFDC plan.

The methods of the approved title IV-E Plan.

The methods of the approved AFDC State plan and/or any more liberal methods described in Supplement 8a to ATTACHMENT 2.6A.

The methods of the approved title IV-E plan and/or any more liberal methods described in Supplement 8a to ATTACHMENT 2.6A.

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TN.No. 07-002  
Supersedes  
TN.No. 92-03

Approval Date DEC 04 2007

Effective Date: 07-01-07

STATE PLAN UNDER TITLE XIX OF THE SOCIAL SECURITY ACT

ELIGIBILITY CONDITIONS AND REQUIREMENTS

Citation(s)	Condition or Requirement
1902 (e) (6) of the Act	(2) In determining relative financial responsibility, the agency considers only the income of spouses living in the same household as available to spouses and the income of parents as available to children living with parents until the children become 21.
1905 (p) (1), 1902 (m) (4), and 1902 (r) (2) of the Act	(3) The agency continues to treat women eligible under the provisions of sections 1902 (a) (10) of the Act as eligible, without regard to any changes in income of the family of which she is a member, for the 60-day period after her pregnancy ends and any remaining days in the month on which the 60 <sup>th</sup> day falls.  f. <u>Qualified Medicare beneficiaries</u> . In determining countable income for qualified Medicare beneficiaries covered under section 1902 (a) (10) (E) (i) of the Act, the following methods are used:  <input type="checkbox"/> The methods of the SSI program only.  <input checked="" type="checkbox"/> SSI methods and/or any more liberal methods than SSI described in <u>Supplement 8a to ATTACHMENT 2.6-A</u> .  <input type="checkbox"/> For institutional couples, the methods specified under section 1611 (e) (5) of the Act.

TN No. 13-012  
Supersedes  
TN. No. 92-03

Approval Date 5/30/14

Effective Date June 1, 2014

State: INDIANA

Citation

Condition or Requirement

If an individual receives a title II benefit, any amounts attributable to the most recent increase in the monthly insurance benefit as a result of a title II COLA is not counted as income during a "transition period" beginning with January, when the title II benefit for December is received, and ending with the last day of the month following the month of publication of the revised annual Federal poverty level.

For individuals with title II income, the revised poverty levels are not effective until the first day of the month following the end of the transition period.

For individuals not receiving title II income, the revised poverty levels are effective no later than the date of publication.

1905(g) of the Act

g. (1) Qualified disabled and working individuals.

In determining countable income for qualified disabled and working individuals covered under 1902(a)(10)(E)(ii) of the Act, the methods of the SSI program are used.

1905(p) of the Act

(2) Specified low-income Medicare beneficiaries.

In determining countable income for specified low-income Medicare beneficiaries covered under 1902(a)(10)(E)(iii) of the Act, the same method as in f. is used.

TN No. 93-007

Supersedes

TN No. 92-03

Approval Date

4-30-93

Effective Date 1-1-93

State/Territory: INDIANA

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Citation	Condition or Requirement
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1902(u)  
of the Act

(h) COBRA Continuation Beneficiaries

In determining countable income for COBRA continuation beneficiaries, the following disregards are applied:

\_\_\_\_\_ The disregards of the SSI program;

\_\_\_\_\_ The agency uses methodologies for treatment of income more restrictive than the SSI program. These more restrictive methodologies are described in Supplement 4 to Attachment 2.6-A.

NOTE: For COBRA continuation beneficiaries specified at 1902(u)(4), costs incurred from medical care or for any other type of remedial care shall not be taken into account in determining income, except as provided in section 1612(b)(4)(B)(ii).

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TN No. 91-22

Supersedes \_\_\_\_\_

Approval Date 1-16-92

Effective Date 1-1-92

TN No. \_\_\_\_\_

HCFA ID: 7985E

Revision:

ATTACHMENT 2.6-A  
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State: INDIANA

Citation	Condition or Requirement
1902 (a)(10)(A) (ii) (XIII) of the Act	(i) <u>Working Individuals with Disabilities - BBA</u>  In determining countable income and resources for working individuals with disabilities under the BBA, the following methodologies are applied:  ____ The methodologies of the SSI program.  ____ The agency uses methodologies for treatment of income and resources more restrictive than the SSI program. These more restrictive methodologies are described in Supplement 4 (income) and/or Supplement 5 (resources) to Attachment 2.6-A  ____ The agency uses more liberal income and/or resource methodologies than the SSI program. More liberal methodologies are described in Supplement 8a to Attachment 2.6-A. More liberal resource methodologies are described in Supplement 8b to Attachment 2.6-A

TN No. 02-003  
Supersedes  
TN No. N/A

Approval Date 8/8/02

Effective Date: 7/1/02

Revision:

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State: INDIANA

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Citation	Condition or Requirement
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1902 (a)(10)(A)  
(ii)(XV) of the Act

(ii) Working Individuals with Disabilities - Basic Coverage Group - TWWIIA

In determining financial eligibility for working individuals with disabilities under this provision, the following standards and methodologies are applied:

The agency does not apply any income or resource standard.

NOTE: if the above option is chosen, no further eligibility-related options should be elected.

The agency applies the following income and/or resource standards(s):

- The resource standards of the SSI program are used.
- The income standard is 350% of the Federal poverty guidelines.

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TN No. 02-003  
Supersedes  
TN No. N/A

Approval Date 8/8/02

Effective Date: 7/1/02

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Citation(s)

Condition or Requirement

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1902 (a) (10) (A)  
(ii) (XV) of the Act (cont).

Income Methodologies

In determining whether an individual meets the income standard described above, the agency uses the following methodologies:

The income methodologies of the SSI program.

The agency uses methodologies for treatment of income that are more restrictive than the SSI program. These more restrictive methodologies are described in Supplement 4 to Attachment 2.6-A.

The agency uses more liberal income methodologies than the SSI program. More liberal income methodologies are described in Supplement 8a to Attachment 2.6-A.

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TN No. 13-012

Approval Date 5/30/14

Effective Date June 1, 2014

Supersedes

TN. No. 02-003



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State: INDIANA

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Citation	Condition or Requirement
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1902 (a) (10) (A)  
(ii) (XV) of the Act (cont.)

Resource Methodologies

In determining whether an individual meets the income standard described above, the agency uses the following methodologies.

Unless one of the following items is checked the agency, under the authority of section 1902(r)(2) of the Act, disregards all funds held in retirement funds and accounts, including private retirement accounts such as IRAs and other individual accounts, and employer-sponsored retirement plans such as 401(k) plans, Keogh plans, and employer pension plans. Any disregard involving retirement accounts is separately described in Supplement 8b to Attachment 2.6-A.

The agency disregards funds held in employer-sponsored retirement plans, but not private retirement plans.

The agency disregards funds in retirement accounts in a manner other than those described above. The agency's disregards are specified in Supplement 8b to Attachment 2.6-A.

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TN No. 02-003  
Supersedes  
TN No. N/A

Approval Date 8/8/02

Effective Date: 7/1/02  
HCFA ID:

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Citation(s)	Condition or Requirement
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1902 (a) (10) (A)  
(ii) (XV) of the Act (cont).

The agency does not disregard funds in retirement accounts.

The agency uses resource methodologies in addition to any indicated above that are more liberal than those used by the SSI program. More liberal resource methodologies are described in Supplement 8b to Attachment 2.6-A.

The agency uses the resource methodologies of the SSI program.

The agency uses methodologies for treatment of resources that are more restrictive than the SSI program. These more restrictive methodologies are described in Supplement 5 to Attachment 2.6-A.

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Citation

Condition or Requirement

1902 (a)(10)(A)  
(ii)(XVI) of the Act

(iii) Working Individuals with Disabilities -  
Employed Medically Improved Individuals -  
TWWIA

In determining financial eligibility for employed medically improved individuals under this provision, the following standards and methodologies are applied:

The agency does not apply any income or resource standard.

NOTE: if the above option is chosen, no further eligibility-related options should be elected.

The agency applies the following income and/or resource standards(s):

- The resource standards of the SSI program are used.
- The income standard is 350% of the Federal poverty guidelines.

TN No. 02-003  
Supercedes  
TN No. N/A

Approval Date 8/8/02

Effective Date: 7/1/02

HCFA ID:

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Citation(s)

Condition or Requirement

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1902 (a) (10) (A)  
(ii) (XVI) of the Act (cont).

Income Methodologies

In determining whether an individual meets the income standard described above, the agency uses the following methodologies:

The income methodologies of the SSI program.

The agency uses methodologies for treatment of income that are more restrictive than the SSI program. These more restrictive methodologies are described in Supplement 4 to Attachment 2.6-A.

The agency uses more liberal income methodologies than the SSI program. More liberal income methodologies are described in Supplement 8a to Attachment 2.6-A.

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TN No. 13-012

Approval Date 5/30/14

Effective Date June 1, 2014

Supersedes

TN. No. 02-003

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Citation	Condition or Requirement
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1902 (a) (10) (A)  
(ii) (XVI) of the Act (cont.)

Resource Methodologies

In determining whether an individual meets the resource standard described above, the agency uses the following methodologies.

Unless one of the following items is checked the agency, under the authority of section 1902(r)(2) of the Act, disregards all funds held in retirement funds and accounts, including private retirement accounts such as IRAs and other individual accounts, and employer-sponsored retirement plans such as 401(k) plans, Keogh plans, and employer pension plans. Any disregard involving retirement accounts is separately described in Supplement 8b to Attachment 2.6-A.

\_\_\_\_\_ The agency disregards funds held in employer-sponsored retirement plans, but not private retirement plans.

\_\_\_\_\_ The agency disregards funds in retirement accounts in a manner other than those described above. The agency's disregards are specified in Supplement 8b to Attachment 2.6-A.

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TN No. 02-003  
Supersedes  
TN No. N/A

Approval Date 8/8/02 Effective Date: 7/1/02  
HCFA ID:

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Citation(s)	Condition or Requirement
1902 (a) (10) (A) (ii) (XVI) of the Act (cont).	<p><input type="checkbox"/> The agency does not disregard retirement accounts.</p> <p><input checked="" type="checkbox"/> The agency uses resource methodologies in addition to any indicated above that are more liberal than those used by the SSI program. More liberal resource methodologies are described in Supplement 8b to Attachment 2.6-A.</p> <p><input type="checkbox"/> The agency uses the resource methodologies of the SSI program.</p> <p><input type="checkbox"/> The agency uses methodologies for treatment of resources that are more restrictive than the SSI program. These more restrictive methodologies are described in Supplement 5 to Attachment 2.6-A.</p>

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1902 (a)(10)(A)  
(ii)(XVI) and 1905 (v) (2)  
of the Act

Definition of Employed - Employed Medically  
Improved Individuals - TWWIIA

The agency uses the statutory definition of "employed", i.e., earning at least the minimum wage, and working at least 40 hours a month.

The agency uses an alternative definition of "employed" that provides for substantial and reasonable threshold criteria for hours of work, wages, or other measures. The agency's threshold criteria are described below:

The individual must be employed and be earning the equivalent of 40 hours per month at minimum wage.

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TN No. 02-003  
Supersedes  
TN No. N/A

Approval Date 8/8/02 Effective Date: 7/01/02  
HCFA ID:

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Citation	Condition or Requirement
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1902 (a)(10)(A)(ii)(XIII),  
(XV),(XVI), and 1916(g)  
of the Act

Payment of Premiums or Other Cost Sharing Charges

For individuals eligible under the BBA eligibility group  
described in No. 23 on page 23d of Attachment 2.2-A:

\_\_\_\_\_ The agency requires payment of premiums or  
other cost-sharing charges on a sliding scale  
based on income. The premiums or other cost-  
sharing charges, and how they are applied, are  
described below:

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TN No. 02-003  
Supersedes  
TN No. N/A

Approval Date 8/8/02 Effective Date: 7/1/02  
HCFA ID:



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Citation	Condition or Requirement
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1902 (a)(10)(A)(ii)(XIII),  
(XV),(XVI), and 1916(g)  
of the Act (cont.)

For individuals eligible under the Basic Coverage Group described in No. 24 on page 23d of Attachment 2.2-A, and the Medical Improvement described in No. 25 on page 23d of Attachment 2.2-A

NOTE: Regardless of the option selected below, the agency MUST require that individuals whose annual adjusted gross income, as defined under IRS statute, exceeds \$75,000 pay 100 percent of premiums.

X The agency requires individuals to pay premiums or other cost-sharing charges on a sliding scale based on income. For individuals with net annual income below 450 percent of the Federal poverty level for a family of the size involved, the amount of premiums cannot exceed 7.5 percent of the individual's income.

The premiums or other cost-sharing charges, and how they are applied, are described on page 12o.

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TN No. 02-003  
Supersedes  
TN No. N/A

Approval Date 8/8/02 Effective Date 7/01/02  
HCFA ID:

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Citation	Condition or Requirement
1902 (a)(10)(A) (ii) (XV),(XVI), and 1916(g) of the Act (cont.)	<u>Premiums and Other Cost-Sharing Charges</u>

For the Basic Coverage Group and the Medical Improvement Group, the agency's premium or other cost-sharing charges, and how they are applied, are described below.

The gross income of the individual and his or her spouse is used to calculate the amount, if any, of the premium. If the gross income of the individual and his or spouse is less than 150% of the FPL, a premium is not required. If gross income of the individual and spouse is 150% or more, premiums are charged as follows:

Gross income as a % of FPL	Monthly Premium Amount	
	Individual	Married Couple
150% to 175%	\$48	\$65
More than 175% to 200%	\$69	\$93
More than 200% to 250%	\$107	\$145
More than 250% to 300%	\$134	\$182
More than 300% to 350%	\$161	\$218
More than 350%	\$187	\$254

If both members of a married couple are eligible in either the Basic Group or the Medically Improved Group, the premium from the above table based on their combined gross income is a single premium covering both spouses.

An amount paid by the recipient, spouse or parent for private health insurance that covers the recipient is deducted from the premium amount in the table to arrive at an adjusted premium.

The premium for an eligible individual will not increase for 12 consecutive months.

A maximum grace period of 60 days for non payment of the premium is allowed before coverage is discontinued.

TN No. 02-003  
Supersedes  
TN No. N/A

Approval Date 8/8/02 Effective Date: 7/01/02  
HCFA ID:

State: INDIANA

Citation	Condition or Requirement
1902(k) of the Act	<p>2. Medicaid Qualifying Trusts</p> <p>In the case of a Medicaid qualifying trust described in section 1902(k)(2) of the Act, the amount from the trust that is deemed available to the individual who established the trust (or whose spouse established the trust) is the maximum amount that the trustee(s) is permitted under the trust to distribute to the individual. This amount is deemed available to the individual, whether or not the distribution is actually made. This provision does not apply to any trust or initial trust decree established before April 7, 1986, solely for the benefit of a mentally retarded individual who resides in an intermediate care facility for the mentally retarded.</p> <p><input type="checkbox"/> The agency does not count the funds in a trust as described above in any instance where the State determines that it would work an undue hardship. <u>Supplement 10 of ATTACHMENT 2.6-A</u> specifies what constitutes an undue hardship.</p>
1902(a)(10) of the Act	<p>3. Medically needy income levels (MNILs) are based on family size.</p> <p><u>Supplement 1 to ATTACHMENT 2.6-A</u> specifies the MNILs for all covered medically needy groups. If the agency chooses more restrictive levels under section 1902(f) of the Act, <u>Supplement 1</u> so indicates.</p>

TN No. 91-22  
Supersedes  
TN No. \_\_\_\_\_

Approval Date 1-16-92

Effective Date 1-1-92

HCFA ID: 7985E

State: INDIANA

Citation	Condition or Requirement
42 CFR 435.732, 435.831	<p>4. Handling of Excess Income - Spend-down for the Medically Needy in All States and the Categorically Needy in 1902(f) States Only</p> <p>a. <u>Medically Needy</u></p> <p>(1) Income in excess of the MNIL is considered as available for payment of medical care and services. The Medicaid agency measures available income for periods of either ___ or ___ month(s) (not to exceed 6 months) to determine the amount of excess countable income applicable to the cost of medical care and services.</p> <p>(2) If countable income exceeds the MNIL standard, the agency deducts the following incurred expenses in the following order:</p> <p>(a) Health insurance premiums, deductibles and coinsurance charges.</p> <p>(b) Expenses for necessary medical and remedial care not included in the plan.</p> <p>(c) Expenses for necessary medical and remedial care included in the plan.</p> <p>___ Reasonable limits on amounts of expenses deducted from income under a.(2)(a) and (b) above are listed below.</p>

1902(a)(17) of the Act

Incurred expenses that are subject to payment by a third party are not deducted unless the expenses are subject to payment by a third party that is a publicly funded program (other than Medicaid) of a State or local government.

TN No. 91-22

Supersedes \_\_\_\_\_

TN No. \_\_\_\_\_

Approval Date 1-16-92

Effective Date 1-1-92

HCFA ID: 7985E

Revision: HCFA-PM-91-8 (MB)  
October 1991

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Page 14a  
OMB No.

State/Territory: INDIANA

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Citation	Condition or Requirement
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1903(f)(2) of  
the Act

a. Medically Needy (Continued)

— (3) If countable income exceeds the MNIL standard, the agency deducts spenddown payments made to the State by the individual.

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TN No. 91-22  
Supersedes —  
TN No. —

Approval Date 1-16-92

Effective Date 1-1-92

HCFA ID: 7985E/

State: INDIANA

Citation	Condition or Requirement
42 CFR 435.732	<p>b. <u>Categorically Needy - Section 1902 (f) States</u></p> <p>The agency applies the following policy under the provisions of section 1902(f) of the Act. The following amounts are deducted from income to determine the individual's countable income:</p> <ol style="list-style-type: none"><li>(1) Any SSI benefit received.</li><li>(2) Any State supplement received that is within the scope of an agreement described in sections 1616 or 1634 of the Act, or a State supplement within the scope of section 1902(a)(10)(A)(ii)(XI) of the Act.</li><li>(3) Increases in OASDI that are deducted under §§435.134 and 435.135 for individuals specified in that section, in the manner elected by the State under that section.</li><li>(4) Other deductions from income described in this plan at <u>Attachment 2.6-A, Supplement 4</u>.</li><li>(5) Incurred expenses for necessary medical and remedial services recognized under State law.</li></ol>
1902(a)(17) of the Act, P.L. 100-203	<p>Incurred expenses that are subject to payment by a third party are not deducted unless the expenses are subject to payment by a third party that is a publicly funded program (other than Medicaid) of a State or local government.</p>

TN No. 91-22  
Supersedes  
TN No. \_\_\_\_\_

Approval Date 1-16-92

Effective Date 1-1-92

HCFA ID: 7985E

Revision: HCFA-PM-91-8 (MB)  
October 1991

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Citation	Condition or Requirement
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4.b. Categorically Needy - Section 1902(f) States  
Continued

1903(f)(2) of  
the Act

\_\_\_ (6) Spenddown payments made to the State by  
the individual.

NOTE: FFP will be reduced to the extent a State is  
paid a spenddown payment by the individual.

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TN No. 91-22  
Supersedes     
TN No.   

Approval Date 1-16-92

Effective Date 1-1-92

HCFA ID: 7985E/