

MAGI HOUSEHOLD COMPOSITION AND CIRCUMSTANCES

EACH MAGI MEMBER'S ELIGIBILITY IS DETERMINED INDEPENDENTLY AND WILL HAVE A SEPARATE HOUSEHOLD COMPOSITION WHICH IS REFERRED TO AS A MONTHLY BUDGET UNIT (MBU).

Each MBU consists of individuals who will be included in the Household size, and whose income will be considered when determining individual MAGI eligibility.

CBMS Pages to Determine Household Composition (includes but not limited to):

- Demographics/Marital Status
- Household Relationship
- Attributes
- Individual Tax Information

MBUS ARE BASED ON TAX FILING RELATIONSHIPS AS WELL AS LEGAL AND BIOLOGICAL RELATIONSHIPS.

Tax Relationship (who will be filing taxes together?)

- **Tax Filer-** An individual, head of household or married couple who expects to file a tax return
- **Tax Dependent-** Anyone expected to be claimed as a dependent by a Tax Filer
- **Non-Filer-** An individual who neither files a tax return nor is claimed as a tax dependent

Biological Relationship

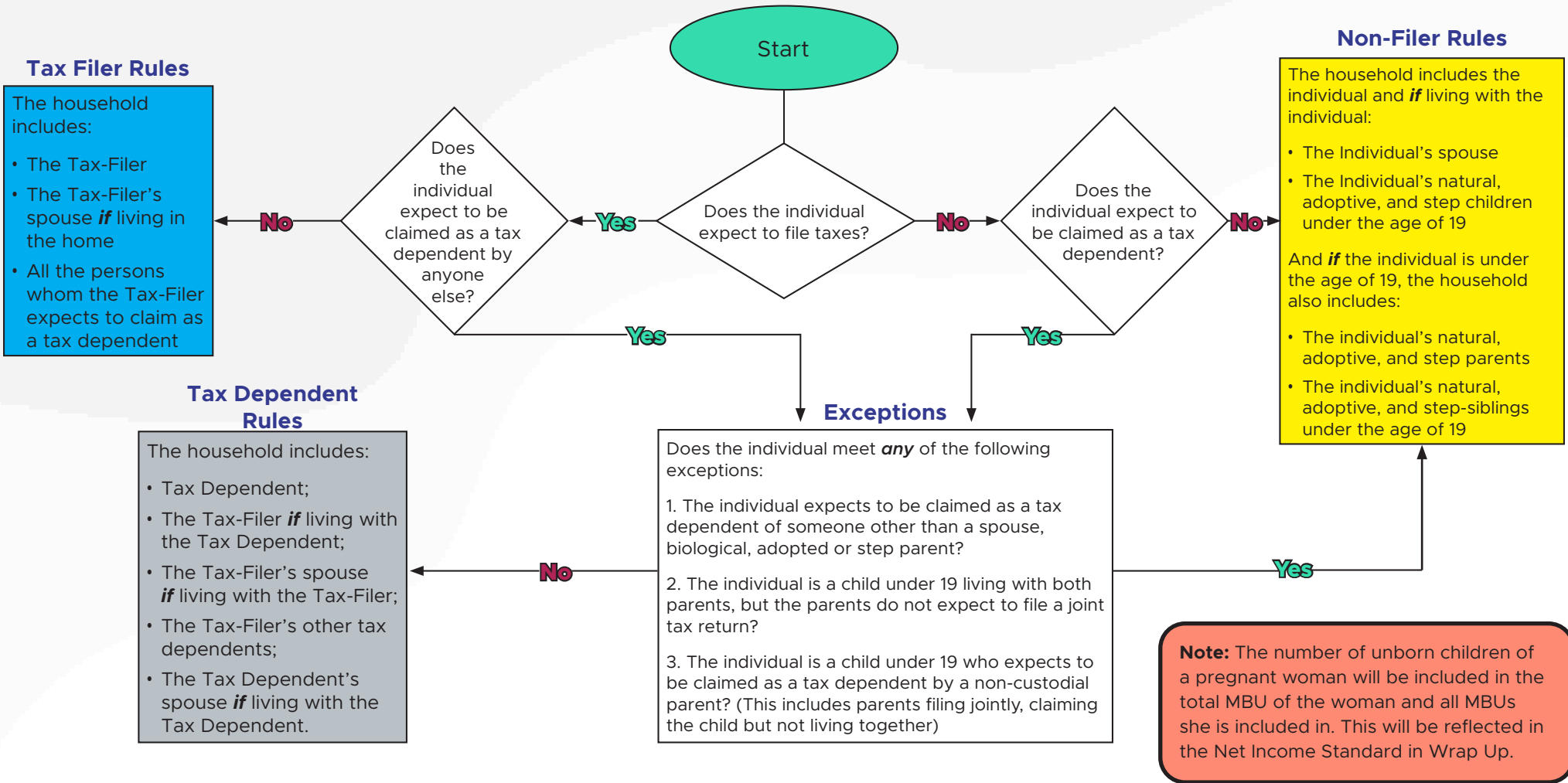
- Parent
- Child
- Sibling

Legal Relationship

- Spouse
- Adopted child/parent
- Step-child, step-sibling



USING THE MBU FLOW CHART



***Remember: Each individual's MBU will be determined separately.**

UNDERSTANDING WRAP UP

In wrap up, MBU will be displayed as **Participation Status** and will show each person as either Eligible, Counted or Excluded in that person's MBU based on the Tax Filer Rules.

If a person is included in a member's MBU, their income will be considered for the member's eligibility, following countable and exempt income rules for MAGI.

Household Member	Circumstances	Participation Status (Wrap Up)	Included in MBU	Income Considered?
Member	The member will always be included in their own MBU	Eligible Adult	X	X
		Eligible Child	X	X
Adult	Follow MBU Flowchart	Counted Adult	X	X
		Excluded Adult		
Child	Follow MBU Flowchart	Counted Child	X	X
		Excluded Child		