

Reasonable Compatibility Job Aid

Compared to Income Standard of Individual Assistance Group (AG)	Reasonably Compatible?	Next Steps		Amount to Budget (Client Reported or Electronic Source)	AWAA Authorization Code
1. Client Reported ABOVE the income standard and <u>all</u> the Electronic Data Sources match client reported sources ABOVE/BELOW the income standard	Apply 10% Reasonable Compatibility Test	A. Difference is LESS THAN 10%	Take client statement as over income	Budget client reported amount	Enroll in Medically Needy
		B. Difference is MORE THAN 10%	Make contact for reasonable explanation	i. If explained, budget client reported amount	Enroll in Medically Needy
				ii. If unable to explain or contact, do not pend for verification	Budget the higher amount and enroll in Medically Needy
2. Both Client and <u>all</u> Electronic Data Sources match and are BELOW the income standard	N/A		Take client statement as ELIGIBLE	Budget client reported amount	Open Medicaid
3. Client Statement BELOW the income standard and <u>all</u> the Electronic Data Sources match client reported sources ABOVE the income standard	Apply 10% Reasonable Compatibility Test	A. Difference is LESS THAN 10%	Take client statement as ELIGIBLE	Budget client reported amount	Open Medicaid
		B. Difference is MORE THAN 10%	Make contact for reasonable explanation	i. If explained, budget client reported amount	Open Medicaid
				ii. If unable to explain or contact, request verification of income	a. If verification provided, budget amount per verification and open Medicaid OR enroll in Medically Needy b. If verification not provided, budget electronic data source amount and enroll in Medically Needy
4. Client Statement BELOW the income standard and NO Electronic Data Source	N/A		Request verification of income	i. If verification provided, budget amount per verification	Open Medicaid OR enroll in Medically Needy based on verified amount
ii. If verification not provided	Deny for failure to return requested information				
5. Client Statement ABOVE the income standard and NO Electronic Data Source	N/A		Take client statement as over income	Budget client reported amount.	Enroll in Medically Needy with an estimated share of cost

6. Client Statement is different than Electronic Source (Example: Client reported working at Karen's Bakery and Electronic Data Source reported working at Wal-Mart)	Make contact for reasonable explanation of all employers	If able to contact, take client statement for reported employment status (i.e. loss of income or new job, etc.)	If client reports:	If all income sources are explained and
			Working at both Client Reported Source(s) (i.e. Karen's Bakery) and Electronic Data Source(s) (i.e. Wal-Mart), and	BELOW the income standard, then follow the Next Steps in #4 .
			Working at Electronic Data Source(s) (i.e. Wal-Mart) only, and	ABOVE the income standard, then follow the Next Steps in #5. Note: Budget all explained income. (Example: If client's explanation is working at Karen's Bakery (client reported source) and Wal-Mart (Electronic Data Source) budget both
			Working at Client Reported Source(s) (i.e. Karen's Bakery) only, and	Budget income based on Electronic Data Source(s) and Open Medicaid OR enroll in Medically Needy based on verified amount
		ii. If unable to explain or contact, request verification of income	BELOW the income standard, then follow the Next Steps in #4	
			ABOVE the income standard, then Enroll in Medically Needy with an estimated share of cost	
			If verification provided, budget amount per verification and open Medicaid OR enroll in Medically Needy	
			If verification not provided, budget both customer reported source amount and electronic data source amount: Enroll in Medically Needy with an estimated share of cost <u>OR</u> If building full Medicaid Deny for failure to return requested information	

Helpful Hints:

1. Eligibility is determined on an individual level; therefore, staff must apply the information provided at the individual assistance group (AG) level.
2. The Department must not require additional information or documentation unless information needed to determine eligibility is not available electronically or the electronic information is not reasonably compatible with information provided by the applicant/recipient.

Reasonable Compatibility Job Aid Scenario 6 Flow Chart

