

H.R. 1 policy and question guide

mapping application template questions to applicable policy groups

Policy group	Group status	Recommended paper application question	Recommended online application question	Notes
Younger than 19 or 65 years old or older	Non-expansion population	N/A - instructions say to skip if under 19 or over 64	N/A - online applications should already ask for the ages of all household members	
SSI / SSDI recipients	Non-expansion population	N/A - instructions say to skip if receiving SSI or SSDI	N/A - identify status through data sharing	Data sharing - ideally, this information would be collected through agency data sharing and no additional question would be needed.
American Indian / Alaska Natives (AI/AN)	Specified excluded/excepted	N/A - instructions say to skip if AI/AN	N/A - online applications should already ask about race/ethnicity information, including AI/AN status	Because the CMS application already asks for AI/AN status, moving AI/AN to the instructions at the top of the page felt like the best way to ensure AI/AN residents don't need to report unnecessary information and an effective way to reduce the number of questions overall (especially repetitive ones). American Indian or Alaska Native (AI/AN) status is the best umbrella term for people that would also likely be eligible for Indian Health Service. Paper and online applications likely already include questions about AI/AN status.
Enrolled in or entitled to Medicare A or enrolled in Medicare B	Non-expansion population	N/A - instructions say to skip if receiving Medicare	N/A - identify status through data sharing	Data sharing - ideally, this information would be collected through agency data sharing and no additional question would be needed. Paper and online applications also likely already include questions about additional healthcare or Medicare coverage.

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Household details and work barriers (exemptions): Check all that apply. Are you or anyone applying for Medicaid...		For household detail and work barrier questions, we are asking about current status. There is a later question for applicants to indicate if any situations applied last month but not this month. Whenever possible, states should use data to confirm whether information is true today and/or in the lookback period so residents are accurately assessed without undue burden.		
Pregnant	Non-expansion population	Pregnant now or within the past 12 months?	Is anyone pregnant now or within the past 12 months?	If a state needs to know about a specific postpartum period other than 12 months we recommend a drill down question (e.g. "within the last 3 months?").
Postpartum (now or in last 12 months)	Specified excluded/excepted			If states need to know more information about current pregnancies (e.g. due date), there should be two separate questions: "Is anyone in the household currently pregnant?" and "Was anyone in the household pregnant in the last 12 months?" with additional follow-up questions as needed.
Low income parents - Section 1931 level above 32% FPL*	Non-expansion population	A parent of a child under 18?	Is anyone a parent or caregiver of a child under 18 (caregivers include relatives, household members of the child, or anyone else who provides at least 80 hours of care per month)? -> [If yes]: Who? -> Which of these apply for [name]? Parent of a child under 14, parent of a child 14-18, non-parent caregiver of a child under 14, none of the above ->If non-parent caregiver, which months?	If a state’s Section 1931 %FPL is greater than 32%, households with children under 18 will never need to report work activity hours.
Low income parents - Section 1931 level below 32% FPL*	Non-expansion population	A parent of a child aged 14-18, whose income is below x% of the Federal Poverty Level (FPL)? For a family of 2: \$xx,xxx . For a family of 4: \$xx,xxx .		Paper: Replace the x% with your state’s %FPL level for Section 1931 parents. Replace the \$xx,xxx with the relevant annual income for each household size based on your state’s %FPL for Section 1931 parents.

*Note on Section 1931 guidance:

- To simplify, we make the assumption that this guidance will be most relevant for households of 2 or more** (at least one parent and one child). However, there could be relevant 1-person households, for example, when a non-custodial parent claims a child on their tax return. In that case a state may need to gather more information if their 1931 limit is below 44% FPL.
- Based on the \$580/month household income threshold to meet the work requirements, if a household of 2 makes 32.1% FPL or more, they are meeting the requirement through income. Conversely, if that household makes less than 32.1% FPL, and the state 1931 threshold is above 32.1% FPL, then that household is covered through the Section 1931 Medicaid pathway and work requirements would not apply. **In both circumstances, if a state Section 1931 %FPL is greater than 32.1%, households with children under 18 will not need to report work activity hours.**
- For larger families, the %FPL a household would need to reach \$580/month would be lower (e.g. for a family of 4, they would need to make 21% FPL to reach \$580 per month). Thus, using the higher percentage for a household of 2 also covers larger households (though not households of 1, which would require 44% FPL).
- For state paper applications, **we recommend using 32.1% FPL as the Section 1931 threshold** because if your state is above this level (e.g. VT at 33% FPL for Section 1931), you can ask the much simpler question: is someone a parent of a child under 18. If your state is below this level (e.g. UT at 30% FPL for Section 1931), you will need to ask the full %FPL question.

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Caregivers of young children	Specified excluded/excepted	A [parent or non-parent] caregiver of a child under 14 (caregivers include relatives, household members of the child, or anyone else who provides at least 80 hours of care per month)?	See low income parents	Paper: For states with Section 1931 %FPL levels above 32%, use “non-parent”. For states with states with section 1931 %FPL levels below 32%, use “parent or caregiver.”
Caregivers of people who need help with daily activities	Specified excluded/excepted	A caregiver of someone who needs help with daily activities, such as a disabled person or older adult (caregivers include relatives, household members of the individual, or anyone else who provides at least 80 hours of care per month)?	Is anyone a caregiver of someone who needs help with daily activities, such as a disabled person or older adult (caregivers include relatives, household members of the individual, or anyone else who provides at least 80 hours of care per month)? --> [If yes]: Which months?	
Meeting TANF work requirements	Specified excluded/excepted	Already required to complete work requirements for food (SNAP) or cash benefits (TANF) ?	N/A - identify status through data sharing	Paper: While this question does not perfectly align with the policy group specified in the legislation, capturing every nuance would make the question too complicated for residents to answer. This is a simplified approach to help residents assess this status as accurately as possible.
SNAP recipients not exempt from work requirements	Specified excluded/excepted			Online: Data sharing - ideally, this information would be collected through agency data sharing and no additional question would be needed. If data sharing is not possible, consider using the paper application question.
Drug abuse treatment participant	Specified excluded/excepted	In a treatment program for a drug or alcohol disorder?	Is anyone in a treatment program for a drug or alcohol disorder? --> [If yes]: Which months?	
Alcohol abuse treatment / rehab participant	Specified excluded/excepted			
Medically Frail - Substance Use Disorder (SUD)	Specified excluded/excepted	Living with a drug or alcohol disorder that makes it hard to work (including people who have been in recovery for less than 5 years)?	Living with a drug or alcohol disorder that makes it hard to work (including people who have been in recovery for less than 5 years)?	The IFR specified that conditions covered under medical frailty must also impact a resident’s ability to work. Also includes guidance specified in the IFR about people in recovery for less than 5 years.

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Medically Frail - Blind / Disabled / Physical / Intellectual / Developmental Disability	Specified excluded/excepted	Living with a physical, intellectual, or developmental disability that makes it hard to work and do daily activities (such as eating, walking, or getting out of a bed/chair)?	Living with a physical, intellectual, or developmental disability that makes it hard to work and do daily activities (such as eating, walking, or getting out of a bed/chair)? --> [If yes]: Which months?	The IFR specified that conditions covered under medical frailty must also impact a resident’s ability to work. We recommend reconciling this disability question with any existing disability questions to avoid duplicates where possible.
Medically Frail - Disabling mental disorder	Specified excluded/excepted	Living with a mental health disorder that makes it hard to work (such as schizophrenia, major depression, bipolar disorder, panic disorder, etc.)?	Living with a mental health disorder that makes it hard to work (such as schizophrenia, major depression, bipolar disorder, panic disorder, etc.)? --> [If yes]: Which months?	The IFR specified that conditions covered under medical frailty must also impact a resident’s ability to work.
Medically Frail - Serious / complex medical condition	Specified excluded/excepted	Living with a serious health condition that makes it hard to work (such as cancer, multiple sclerosis, HIV/AIDs, viral hepatitis, etc.)?	Living with a serious health condition that makes it hard to work (such as cancer, multiple sclerosis, HIV/AIDs, viral hepatitis, etc.)? --> [If yes]: Which months?	The IFR specified that conditions covered under medical frailty must also impact a resident’s ability to work. Online applications may have combined health condition and disability questions. We recommend separating them for clarity and accuracy.
Disabled veterans	Specified excluded/excepted	A disabled veteran with a 100% disability rating?	Is anyone a veteran or has anyone served in the military or armed forces? --> Is [person(s) selected] a disabled veteran with a 100% disability rating?	Online applications likely already ask about Veteran status - we recommend a drill down question that follows up on Veteran disability status. If there is no current question about Veteran status consider using the paper application question.
Former foster care youth	Non-expansion population	In foster care at age 18 and younger than 26?	Was anyone in foster care when they turned 18?	Online applications likely already ask about foster care status and age - do not add this question if already included.
Current inmate	Specified excluded/excepted	In jail or prison now or in the past 4 months?	Is anyone currently in jail or prison ?	Paper: We recommend asking about inmate status both now and in the past combined; workers will be able to use other incarceration questions to know if the person is currently incarcerated. We recommend asking about the last 4 months, instead of 3, because when assuming a 1-month lookback period applicants who were incarcerated 4 months prior to the month of application could still be exempted.
Recent inmate (past 90 days)	Specified excluded/excepted		Was anyone in jail or prison in the last 4 months ?	Online: Online applications likely already ask about current inmate status. If so, only ask about recent inmate status.

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Lookback period note on paper application: If any of the situations or work barriers (above and on the last page) applied last month, but don’t apply now, they can still count as an exemption.				
Assessing the lookback period	Excepted applicable individual	Did any of the situations or work barriers apply last month but not this month ?	N/A	As noted in the IFR, specified excluded statuses can count as exemptions during the lookback period if they are not currently applicable.
Other situations and income section: If these situations apply, let us know which months. Are you or anyone applying for Medicaid...				
Short term hardship - Medical travel	State optional short-term hardship	Traveling an hour or more to get medical care for themselves or a dependent with a serious health condition (including doing travel coordination that makes it hard to work)?	Traveling an hour or more to get medical care for themselves or a dependent with a serious health condition (including doing travel coordination that makes it hard to work)? --> [If yes]: Which months?	The IFR lets states define the distance for medical travel. In testing, residents wanted clarity on “outside your community”; “traveling an hour or more” is our recommendation. Question specifies this month and/or last month so that coverage can be future dated if this status only applies in the month of application. Remove this question if not implementing short-term hardships.
Short term hardship - Inpatient care	State optional short-term hardship	Receiving care in a hospital for more than 24 hours, or getting similar care at another location (such as a nursing facility, psychiatric hospital, clinic, the VA, at-home, etc.)?	Receiving care in a hospital for more than 24 hours, or getting similar care at another location (such as a nursing facility, psychiatric hospital, clinic, the VA, at-home, etc.)? --> [If yes]: Which months?	The IFR clarified a 24-hour threshold for hospital stays and noted that the definition includes other services of similar acuity. Question specifies this month and/or last month so that coverage can be future dated if this status only applies in the month of application. Remove this question if not implementing short-term hardships.
Short term hardship - Federally declared disaster	State optional short-term hardship	N/A	N/A	The short-term hardship for federally declared emergency or disaster should be applied for by the state. If granted, everyone in the area will be automatically exempted - no application question or assessment by eligibility workers needed.
Short term hardship - High unemployment area	State optional short-term hardship	N/A	N/A	The short-term hardship for high unemployment should be applied for by the state. If granted, everyone in the area will be automatically exempted - no application question or assessment by eligibility workers needed.
At least half-time enrollment in educational program	Qualifying Activity	Enrolled as a student (college, vocational, or GED program) full-time or at least half-time? Part-time students can report hours under work activities.	Enrolled as a student (college, vocational, or GED program) full-time or at least half-time? Part-time students can report hours under work activities. --> [If yes]: Which months?	Part-time student hours can be added in the work activity table / questions. Question specifies this month and/or last month so that coverage can be future dated if this status only applies in the month of application.

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Monthly income of at least \$580	Qualifying Activity	Does your household make at least \$580 in monthly income (includes all jobs, gig work, seasonal work, and unearned income such as unemployment)? Income from seasonal work can be averaged across 6 months.	Does your household make at least \$580 in monthly income (includes all jobs, gig work, seasonal work, and unearned income such as unemployment)? Income from seasonal work can be averaged across 6 months. --> [If yes]: Which months?	The IFR specified income is calculated using MAGI household income. We recommend including this income question so residents can self-attest to their household earning \$580 per month or more. Workers can use the attestation with quarterly wage data - often a few months behind - to verify household income. Question specifies this month and/or last month so that coverage can be future dated if this status only applies in the month of application.
Average monthly income of at least \$580/month for seasonal worker over six month period	Qualifying Activity			
80 hours of community service	Qualifying Activity	Assessed in work activity table	Assessed in work and activity hours questions	
80 hours of work program	Qualifying Activity	Assessed in work activity table	Assessed in work and activity hours questions	
80 hours combination of employment, work program, community service or school	Qualifying Activity	Assessed in work activity table	Assessed in work and activity hours questions	
80 hours of employment	Qualifying Activity	Assessed in work activity table	Income / Employment section: How many hours did [person] work for this job last month?	