# Discussion only:
# Potential Automation of Spousal Impoverishment

| Approach | Description | Advantages | Disadvantages |
|---|---|---|---|
| Requested Medi-Cal Type | Utilize existing Requested Medi-Cal Types:<br>• DDS HCBS Waiver<br>• Medi-Cal In Home Operations Waiver<br><br>Eligibility will be run through the Medi-Cal Hierarchy based on the Requested Medi-Cal Type.<br><br>**Medi-Cal In-Home Operations Waiver individual:**<br>• Without a spouse, no special budgeting provisions.<br>• With a spouse, spousal impoverishment rules apply.<br><br>**DDS HCBS Waiver individual**<br>• Run through Medi-Cal Hierarchy utilizing parent's income and property.<br>• Ineligibility or a share of cost results, then evaluate for non-MAGI with only waiver individual's income and property. | Waiver Requested Medi-Cal Type identifies case as containing a waiver individual | Worker driving eligibility versus allowing the system to make determination based on case data |
| Customer Options Record | • Utilize Requested Medi-Cal Type of Medi-Cal. Eligibility will run through the Medi-Cal Hierarchy<br>• Waiver budgeting provisions will be driven by a Customer Options record<br>  ▪ Create a Customer Options Type of:<br>    ✓ HCBS Waiver-Spousal Impoverishment<br>    ✓ HCBS Waiver-DDS | • Allow system to make determination based on case data<br>• Simplified update if a person requesting or pending a waiver is not approved, end date Customer Options record and run EDBC. | • Worker must create a Customer Options Type record<br>• Waiver is not readily identified<br>• Waiver identifier may be needed, i.e., non-married individual will not need spousal impoverishment Customer Options Type but may still need to be identified as a waiver individual. |

**Notes:**
Customer Option Types could be renamed.
Requested Medi-Cal Types could be renamed.
The MC 604 MDV is being added to the CalSAWS template repository in release 22.01 (CA-203671).


**Questions for counties:**
Do counties utilize the determined aid code or waiver aid codes?
Have counties experienced customers requesting retroactive eligibility back to 2014 or later?
What are approximate numbers of waiver individuals requiring spousal impoverishment rules?
Any suggestions for what counties would like to see in CalSAWS that will assist with waiver processing? (Keep in mind, currently the budgeting is manual, but it will be automated.)

07/28/2021 (EM)