



**Tax Filer Information On Paper Applications**

**02/20/2015**

This NEWS FLASH is being issued to inform staff that, effective immediately, paper applications for Medical Assistance (MA) MUST be entered into HEAplus when tax filer information questions are answered.

**EXCEPTION**

Adoption Subsidy and Foster Care Cases that are assigned to case load 940 and cases where the participants are receiving Transitional Medical Assistance (TMA) must remain in AZTECS until further notice.

DO NOT register paper applications for MA in AZTECS that contain answers to tax filer information. AZTECS is not programmed to accept or process tax filer information. When a case is denied in AZTECS and referred over to HEAplus via the Technology Interface Project (TIPS) process, the tax filer information is not processed. This is causing incorrect denials in HEAplus.

Tax filer information is located in the Federal Income Tax Filing section for each person listed on the paper application, beginning on page 5.

**+** **Federal Income Tax Filing: Tell us how PERSON 1 will file income taxes NEXT YEAR.**

Will PERSON 1 file taxes NEXT YEAR?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
If 'Yes,' will PERSON 1 file jointly with a spouse?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If 'Yes,' name of spouse: _____
Will PERSON 1 claim dependents on his/her tax return?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If 'Yes,' name of dependent(s): _____
Will PERSON 1 be claimed as a dependent on someone else's tax return?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If 'Yes,' name of tax filer: _____ Relationship to tax filer: _____
Does PERSON 1 pay any expenses that may be deducted on the federal income tax return? Do not include self-employment expenses. Check all that apply.	<input type="checkbox"/> Alimony <input type="checkbox"/> Student loan interest <input type="checkbox"/> Other deductions Describe deductions: _____	Amount paid: _____ How often? _____ Amount paid: _____ How often? _____ Amount paid: _____ How often? _____

When a paper application for MA that contains tax filer information is already registered in AZTECS, do NOT make the determination. Key all of the information from the paper application into HEAplus and complete the MA determination. Once the determination is completed in HEAplus the case MUST be denied in AZTECS using the HP Denial or Closure Reason Code.

The day the MA disposition is completed in HEAplus is the same day that the AZTECS case MUST be closed using the HP Denial or Closure Reason Code.



Arizona Department of Economic Security  
Arizona Health Care Cost Containment System

Beginning January 1, 2014, Modified Adjusted Gross Income (MAGI) policy is used for the following AHCCCS Medical Assistance (MA) programs:

- Adult
- Caretaker Relative, including the second six months of Transitional Medical Assistance (TMA)
- Pregnant Woman, including the second 12 months of Family Planning Extension Program coverage
- Child
- KidsCare

The MAGI budget group is determined based on the tax filer information. To qualify, the counted income of the customer's MAGI budget group minus any allowable deductions cannot be more than the income standard for the MA program and the size of the budget group.

When the MAGI budget group is not correctly identified the determination does NOT process correctly.

NOTE: People living in the same home may have different budget groups and MA categories. Income eligibility is determined for each person based on their budget group and category.

Please contact the FAA Policy Support Team by phone at **(602) 774-5523** or by e-mail at **FAAPolicyMgmt@azdes.gov** with any questions or concerns regarding this broadcast.

**Please consider the environment before printing this broadcast.**

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