

MISSISSIPPI DIVISION OF MEDICAID

Eligibility Policy and Procedures Manual

CHAPTER 200 – Income: Aged, Blind and Disabled (ABD) Categories

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200.07.31A ASSISTANCE UNDER TITLE IV OF HEA OR BUREAU OF INDIAN AFFAIRS (BIA)

All student financial assistance received under HEA or BIA assistance programs is excluded from income and resources, regardless of use. The resource exclusion does not have a time limit, i.e., regardless of how long held, the assistance is excluded from resources. Interest and dividends earned on unspent educational assistance under Title IV HEA and BIA are excluded from income.

Examples of HEA Title IV programs include:

- PELL grants;
- State Student Incentives
- Academic Achievement Incentive Scholarships
- Byrd Scholars
- Federal Supplemental Educational Opportunity Grants (FSEOG)
- Federal Educational loans (Federal PLUS, Perkins, Stafford, Ford loans)
- Upward Bound
- GEAR Up (Gaining Early Awareness and Readiness for Undergraduate Programs)
- LEAP (Leveraging Educational Assistance Partnership)
- SLEAP (Special Leveraging Educational Assistance Partnership)
- Work Study programs
- State educational assistance programs, including work study, funded by LEAP or SLEAP

200.07.31B OTHER GRANTS, SCHOLARSHIPS, FELLOWSHIPS AND GIFTS

Any portion of a grant, scholarship, fellowship or gift used for paying tuition, fees, or other necessary educational expenses at any educational institution, including vocational or technical education, is excluded from income.

Funds Set Aside

Any portion of such educational assistance that is not used for paying current tuition, fees or other necessary educational expenses but will be used for paying this type of educational expense at a future date is excluded from income in the month of receipt.

NOTE: This exclusion does not apply to that portion set aside or actually used for food, clothing or shelter.

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OTHER GRANTS, SCHOLARSHIPS, FELLOWSHIPS AND GIFTS (Continued)

Treatment of Grants, Scholarships, Fellowships or Gifts Not Used or Set Aside

Any portion of grants, scholarships, fellowships, or gifts that is not used or set aside for paying tuition, fees, or other necessary educational expenses is income in the month received and a resource the month after the month of receipt, if retained.

Treatment of Funds Set Aside, But Not Used for Paying Educational Expenses

If any portion of grants, scholarships, fellowships or gifts that is excluded from resource because it is set aside to pay for necessary educational expenses is used for some other purpose, the funds are income at the earliest of the following points:

- In the month that it is spent; or
- The month the individual no longer intends to use the funds to pay necessary educational expense.

Excluded Funds Not Spent

If the funds set aside to pay for necessary educational expenses are not spent after the 9th month, they are countable resources as of the 10th month following the month of receipt.

200.07.31C DETERMINING COUNTABLE AND EXCLUDABLE AMOUNTS OF ASSISTANCE

- Verify that the assistance is a grant, scholarship, fellowship or gift.
 - Use documents in the individual's possession, contact with the institution or provider to verify the nature of the assistance. If the assistance is not totally excluded as Title IV HEA or BIA, verify the amount, date(s) of payment, payee and source of payment/payer, etc.
- Determine the amount of tuition, fees, and other necessary educational expenses.
 - Use receipts, bills with cancelled checks, contact with the provider, etc., to verify expenses paid. If an expense is verified as incurred, but not paid, assume it will be paid. A signed allegation is acceptable evidence of expenses when it is unreasonable to obtain other evidence, e.g., daily bus fare, small expendable items, etc., but this does not apply to tuition, fees or books.