

Medical Assistance (MA) [Chapter 600 Income Eligibility](#) >> [606 Types of Income](#) >> U Educational Assistance

Educational Assistance

Policy
Definitions
Proof
Programs and Legal Authorities

Policy

How Educational Assistance is treated depends on the following:

If the payment is...	And the customer is eligible for...	Then the treatment is...
Financial assistance, including work study, received under Title IV of the Higher Education Act of 1965	All programs	Excluded
Educational Assistance, including work study, received under BIA student assistance programs.	All programs	Excluded
For any other type of educational award or gift		Excluded when used for educational expenses. Counted as unearned income when used for living expenses.
Veteran's Administration (VA) Educational Benefits <ul style="list-style-type: none"> • • • 	ALTCS SSI-MAO MSP	Excluded if paid under a program for vocational rehabilitation. If not part of vocational rehabilitation, counted after

deducting educational expenses.

	<ul style="list-style-type: none"> • Adult • Caretaker Relative • Pregnant Woman • Child • KidsCare 	Excluded.
State funded student loans and other loans	All programs	Excluded.
Work study that is not paid under Title IV or a BIA program.	All programs	Counted as earned income.

Definitions

Term	Definition
Educational expenses	Includes tuition, books, lab fees and other required expenses to enroll in a course.

Proof

Income is first obtained through the Federal and State Data Services Hubs. If needed, other proof includes:

- Request for Verification of Student Information, DE-209;
- Award letter;
- Loan documentation;
- Written statement from the school; or
- Collateral contact with the school.

Types of proof for education gifts include, but are not limited to:

Statement of Facts (DE-118);

Permission to Release Information (DE-201);

Written statement from the person or entity providing the educational gift; and

Collateral contact with the person or entity providing the educational gift.

Expenses must be verified to deduct the expense from the income. Proof of expenses is only needed if the educational income is countable. Types of proof include, but are not limited to:

Request for Verification of Student Information, DE-209;

Receipts;

Written statement from the school;

Collateral contact with the school; or

Programs and Legal Authorities

This requirement applies to the following programs:

Program	Legal Authorities
ALTCS	42 USC 1382a(b)(7)
SSI-MAO	20 CFR 416.1124(c)(3)
Medicare Savings Program	20 CFR, Appendix to Subpart K of Part 416, Section III
Freedom to Work	AAC R9-22-1909
Adult	45 CFR 435.603(e)
Caretaker Relative	42 CFR 457.10, 300, 301 and 315
Pregnant Woman	

Child

KidsCare



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