QUALIFIED MEDICARE BENEFICIARY (QMB)/SPECIFIED LOW-INCOME MEDICARE BENEFICIARY (SLMB)/QUALIFYING INDIVIDUAL (QI) INCOME ELIGIBILITY WORK SHEET CHILD APPLYING WITH OR WITHOUT INELIGIBLE PARENT(S) DO NOT INCLUDE QMB/SLMB/QI PARENT(S), PA, OR OTHER PA

Case name								County district			nty district	County use				
											Effe	ctive eligibilit	y date for	this budge	et	
□ New application □ Redetermination □ Change in income □ Ch							🗖 Cha	ange in circumstances Month				Year				
Case Number County Aid Serial Number Mi			MFBU	Person Number		Name First, Middle, Last		Birth date Month/Day/Year	(2) Health		al Security Number and Insurance Claim Number oad Retirement Number			Other Coverage		
		00114						, <u>_</u>		monta, Day, Foa		(1)				<u>eere age</u>
											_	(2)				
												(2)				
												(1) (2)				
												$\frac{(1)}{(2)}$				
												(1)				
											-	(2) (1)				
											-	(2) (1)				
												(2)				
			NT(S) or S DAPPLYING				IE OF POT	ENTIAL	STEPPA	TION TO MINO RENT(S). DO M E QMB/SLMB/Q	ΙΟΤ ΑΙ	LÌOCATE F	ROM THE			
A. NONEXEMPT UNEARNED INCOME				Ir	Ineligible Parent(s)							<u> </u>	Child Number One	Child Number Two	Child Numbe Three	r Number
I. RSDI									1. Name							
									2. Standard SSI allocation			lincomo				_
2. Net income from property									3. Subtract ineligible minor child(ren) income. Evaluate for student deduction.			-	-	-	_	
3. Other—itemize									 Remaining allocation to ineligible child(ren) (line 2 minus line 3) 			(a)	(b)	(C)	(d)	
4.									5. Total allocation to ineligible child(ren) (add lines 4(a), (b), (c), and (d)).			en)				
5. Total (add lines 1 through 4)									ount from Section		5, on line 6.)					
-		-	e child(ren)	Ψ					III. QMB/SLM	IB/QI CHILD CO	мрити					
(Section II, line 5) 7. Remainder				-	¢				1. Allocation from parent(s) (Section I, line 19, rounded)			\$				
(line 5 minus line 6)				(a) (b)	\$ \$				2. QMB/SLMB/QI child's own RSDI income			+\$				
8. Any income deduction				\$	- 20)						+\$				
 9. Countable unearned income (put on line 16 unless negative) 				-		-			 Add other unearned income Total unearned income (add lines 1 through 3) 							
B. NONEXEMPT EARNED INCOME								5. Subtract any income deduction				_\$	20			
									6. Remainde	r	5001		-Ψ	20		
 Gross earned income Unused portion of allocation to 									(line 4 minus line 5)				= . ¢			
ineligible child(ren)					<u> </u>				7. Child(ren)'s countable earned income				+\$			
12. \$65 earned income deduction plus \$ of unused \$20			s _	-				8. Subtract IRWE 9. Subtract \$65 earned income deduction				-				
13. Remainder			\$	\$				plus \$ of unused \$20			-					
14. D	14. Divide by 2 and subtract				-				(subtract lines 8 and 9 from line 7) 11. Countable earned income)	\$			
15. Countable earned income			\$	\$				(divide line 10 by 2)				=\$				
16. Add countable unearned income (line 9)			+	6				12. Net nonexempt income (add lines 6 and 11)				\$				
17. Total countable income (add lines 15 and 16)			\$					 Current QMB/SLMB/QI pover (a) QMB (100%) (b) QMB (100%) (c) QMB (100%) 		verty le	vel for one \$					
18. S	Subtract parent deduction*				(b) SLMB (120%) (c) QI-1 (135%)											
-	Allocation to QMB/SLMB/QI child						(d) QI-2 (175%)								
If zero or negative, do not count toward applicant's income determination.						ination.	(If line 12 line 12 is l	is less than or e ess than line 13	qual to b), (c).	line 13(a), the cl	he child is hild is inco	income e me eliaibl	e ligible f e for SLI	or QMB. If MB, QI-1 or		
Otherwise, enter this amount on Section III, line 1. * Individual parent deduction amount if any one parent lives with QMB/SLMB/QI child applicant; couple parent deduction amount if both parents live with the child.							line 12 is less than line 13(b), (c), or (d), the child is income eligible for SLMB, QI-1 o QI-2.) (If line 12 exceeds line 13(a), (b), (c), or (d), <i>deny</i> QMB/SLMB/QI-1/QI-2, as long as									
Eligibility Worker signature						the MC 17 Worker numbe	the MC 176-1 QMB/SLMB/QI form has been completed.) rker number Computation date County use									
· · ·									-			1				

QUALIFIED MEDICARE BENEFICIARY (QMB)/SPECIFIED LOW-INCOME MEDICARE BENEFICIARY (SLMB)/QUALIFYING INDIVIDUAL (QI) INCOME ELIGIBILITY WORK SHEET CHILD APPLYING WITH OR WITHOUT INELIGIBLE PARENT(S) DO NOT INCLUDE QMB/SLMB/QI PARENT(S), PA, OR OTHER PA

INSTRUCTIONS, MC 176-2 B QMB/SLMB/QI

Form MC 176-2 B QMB/SLMB/QI, Income Eligibility Work Sheet, is used to compute the income (using current Medi-Cal income methodology and incorporating certain SSI/SSP methodology for QMB/SLMB/QI income criteria which is less restrictive than Medi-Cal methodology) for allocating income from an ineligible parent(s) for a child who is applying under the QMB/SLMB/QI program. This form is used if the child does not qualify using Medi-Cal income rules only. This form is completed at the time of a new application, restoration, reapplication, change in income, or other circumstances affecting the income or correction in the income.

NOTE: The MC 176-1 QMB/SLMB/QI should be completed prior to completion of the 176-2 B QMB/SLMB/QI to determine if the child is found to be eligible using Medi-Cal rules.

Identification Section

- 1. Enter: Case name
- 2. County district: If the county has districts, identify the district.
- 3. County use: Make any entries the county department has designated it wants.
- 4. Check the appropriate box which gives information concerning the reason for the computation. The box "new application" includes restorations and reapplications.
- 5. Effective eligibility date for this budget: Enter the month in which eligibility will begin with this budget computation.
- 6. Case number: For a QMB/SLMB/QI child who is applying as blind or disabled (BD) medically needy (MN), enter the county code, appropriate aid code, seven-digit number, MFBU number, and the person number. If the county does not use a seven-digit serial number, enter zeros in front of the serial number until there are seven digits. For the family members who are not included in the MFBU as eligible members, enter their status under case number.
- 7. Name: Enter the names of all family members living in the home in accordance with the California Code of Regulations (CCR), Title 22, Section 50071, and any BD person or spouse of an BD person in LTC or board and care. Enter an unborn child by listing as the name "unborn" and expected date of birth after "unborn."
- 8. Birth date: Enter the birth date of each person listed. Under sex, enter "M" for male or "F" for female for each person listed.
- 9. Social Security Number: Enter the Social Security number for each person applying as a QMB/SLMB/QI. If a person does not have a Social Security number, he/she is not eligible as a QMB/SLMB/QI. Enter the Medicare or Railroad Retirement claim number, if any. See CCR, Section 50187.
- 10. Other coverage code: Determine the other coverage code in accordance with Section 15, Part A, of the procedural portion of the Medi-Cal Eligibility Manual.

Section I. Parent(s) or Stepparent(s) Income of Potential QMB/SLMB/QI Child Applying as Blind or Disabled (BD)

In this section, enter all the nonexempt unearned and earned income of the ineligible parent(s) of the child who is applying as an BD MN under the QMB/SLMB/QI program. NOTE: "Ineligible parent(s)" refers to the parent(s) of the child who is applying under the QMB/SLMB/QI program. Do not include a parent(s) who is eligible as a QMB/SLMB/QI, PA, or other PA. Only include the income of an ineligible parent(s).

NOTE: The ownership of the income determination required by Section 50512 should be completed prior to the completion of this portion of the form if there is a spouse with LTC status who is in a separate MFBU.

A. Nonexempt Unearned Income

When any of the following deductions apply to a person's income which will be listed in Section I, complete Section VI, Part A, of the MC 176 W instead of lines 1 through 5.

Educational Expenses	Section 50547
Absent Parent Support	Section 50541
Income for Self-Support	Section 50551.5
Court Ordered Child/Spousal Support	Gibbins v. Rank

- 1. Enter: Social Security income.
- 2. Net income received from property.
- 3-4. Enter the amount of all other unearned income.
 - 5. Total the amounts in Section I, Part A, lines 1 through 4. This is the total unearned income of the ineligible parent(s) of the potential QMB/SLMB/QI child.
 - 6. Enter the total amount allocated to the minor child(ren), if any, from the ineligible parent(s). Enter the figure computed from Section II, line 5, onto line 6(b).
 - Subtract line 6 from line 5 or enter the amount from MC 176 W, Section VI, Part A, on 7(a). If this is a minus amount, enter zero on line 7(b) and the minus amount on Section I, Part B, line 11. Otherwise, enter the amount on line 7(a) onto line 7(b).
 - 8. No entry. This shows the \$20 any income deduction.
 - Subtract line 8 from line 7(b). This is the countable unearned income. If the countable unearned income is a minus figure, enter zero on line 16 and enter the minus figure, which is the unused portion of the \$20 any income deduction, in the blank provided on line 12.

B. Nonexempt Earned Income

When any of the following deductions apply to a person's income which will be listed in Section I, complete Section VI, Part B, of the MC 176 W, instead of line 11:

Student Deduction	Section 50551
\$30 Plus One-Third, or \$30	Section 50551.1
Work Expenses for the Blind	Section 50551.4
Income for Self-Support	Section 50551.5
Court Ordered Child/Spousal Support	Gibbins v. Rank

- 10. Enter the gross earned income.
- 11. Enter the unused amount of any allocation for ineligible minor child(ren) that was not offset by countable unearned income (Section I, Part A, line 6). NOTE: If there is no income remaining, either unearned or earned, do not allocate to the QMB/SLMB/QI child(ren). Enter zero in Section III, line 1. If there is income, proceed with line 12.
- 12. Enter the \$65 of the \$65 and one-half deduction plus any unused portion of the \$20 any income deduction.
- 13. Subtract lines 11 and 12 from line 10 to obtain the remaining earned income of the ineligible parent(s). Enter zero if the remainder is a negative amount.
- 14. Divide by 2.
- 15. Subtract line 14 from line 13 to obtain the remaining countable earned income of the ineligible parent(s).
- 16. Enter countable unearned income from line 9.

- 17. Add lines 15 and 16. This figure equals the countable income.
- 18. Enter the parent(s) deduction. Use the parent deduction of a QMB/SLMB/QI child(ren) for an individual, if one ineligible parent lives with the child(ren), or use the parent deduction of a QMB/SLMB/QI child(ren) for a couple, if both ineligible parents live with the potential QMB/SLMB/QI child.
- 19. Subtract line 16 from line 17 and enter this figure on Section III, line 1. This is the allocation from the ineligible parent(s) to the potential QMB/SLMB/QI applicant.

Section II. Allocation to Minor Child(ren) from the Ineligible Parent or Stepparent

- 1. Enter the name(s) of ineligible child(ren). Do not include QMB/SLMB/QI child(ren), PA, or other PA.
- 2. Enter the standard QMB/SLMB/QI allocation for each child. If no child(ren), enter zero on line 5 of this section.
- 3. Enter any income for each minor child(ren), excluding up to \$400 per month and up to \$1,620 per year if student earned income.
- 4. Subtract line 3 from line 2.
- 5. Total all columns on line 4 and enter the total allocation. This figure is also to be entered in Section I, Part A, line 6.

Section III. QMB/SLMB/QI Child Computation

- 1. Enter the parent(s) allocation from Section I, Part B, line 19.
- 2. Enter the potential QMB/SLMB/QI child's own RSDI income.
- 3. Enter any other unearned income the potential QMB/SLMB/QI child may have.
- 4. Total lines 1 through 3.
- 5. No entry. This shows the \$20 any income deduction.
- 6. Subtract line 5 from line 4. This is the total remaining countable unearned income.
- 7. Enter the potential QMB/SLMB/QI child's countable earned income or amount from Section VI, Part B, line 4, of the MC 176 W. If appropriate, allow the student deduction.
- 8. Deduct any impairment related work expenses the potential QMB/SLMB/QI child may have.
- 9. Enter the \$65 of the \$65 and one-half deduction plus any unused portion of the \$20 any income deduction.
- 10. Subtract lines 8 and 9 from line 7 to obtain the remaining earned income of the potential QMB/SLMB/QI child(ren).
- 11. Divide the amount on line 10 by 2 to obtain the total countable earned income of the potential QMB/SLMB/QI child(ren).
- 12. Total lines 6 and 11 for the combined net nonexempt income of the potential QMB/SLMB/QI child(ren).
- Enter the current QMB/SLMB/QI poverty level for one. If line 12 is less than or equal to line 13(a), the child is eligible for QMB. If line 12 is less than line 13(b), (c), or (d), the child is eligible for SLMB or QI-1 or QI-2. If line 12 exceeds line 13(a), (b), (c), or (d), deny QMB/SLMB/QI-1/QI-2 only if Section III, item 5 of the MC 176-1 QMB/SLMB/QI form has been completed.

Eligibility Worker signature: The worker enters his/her signature.

Worker number: If the eligibility worker has a county number, enter here.

Date of computation: The eligibility worker completes the box with the date the form was completed.

County use: Optional-to be used in accordance with county policy.