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MEDI-CAL ELIGIBILITY PROCEDURES MANUAL LETTER NO.: 219

TO: All Holders of the Medi-Cal Eligibility Procedures Manual

ARTICLE 8G--MEDICAL FAMILY BUDGET UNIT (MFBU) DETERMINATIONS FOR THE SECTION 1931(b) PROGRAM

Enclosed is a new procedures section, Article 8G, which describes the MFBU rules and forms for the Section 1931(b) program as outlined in All County Welfare Directors Letters (ACWDL) Nos. 98-43, 99-02, 99-02E, 99-20, 99-32, 99-42, and 99-56. Many of these letters have been corrected and should no longer be used. Please refer to Manual Letter No. 218 dated January 26, 2000 which transmits the Medi-Cal Eligibility Procedures 5S for information on Section 1931(b) general program requirements. Updates to the Transitional Medi-Cal and Four Month Continuing Programs (5B) which was transmitted in Manual Letter No. 217 on January 14, 2000, and the March 1, 2000, changes in the definition of the unemployed parent (5C) will be forthcoming. On March 1, 2000, income limits for Section 1931(b) applicants and for some recipients will change. These procedures provide information on basic MFBU composition which will not change, but they do not contain the new income limits. The income changes are described in ACWDLs 99-54 and 00-04 will be in the Procedures, Article 9 when published.

Filing Instructions:

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If you have any questions, please contact Margie Buzdas at (916) 657-0726 or Erin Lynch at (916) 654-5769.

Sincerely,

Original signed by

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8G -- MFBU DETERMINATIONS FOR THE SECTION 1931(b) PROGRAM

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8G –MFBU DETERMINATIONS FOR THE SECTION 1931(b) PROGRAM

1. BACKGROUND

The Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996 (Public Law 104-193) established a new mandatory coverage group at Section 1931(b) of the Social Security Act. Section 1931(b) requires that Medi-Cal be provided to low-income families, who meet the provisions of the July 16, 1996, Aid to Families with Dependent Children (AFDC) State plan requirements for income, resources and deprivation, (subject to modification at State option). PRWORA also deleted many of the requirements for establishing deprivation based on unemployment.

Section 161 of AB 1542 (Chapter 270, Statutes of 1997) established the California Work Opportunity and Responsibility to Kids (CalWORKs) program and provided that it was to be implemented January 1, 1998. This law also adopted Section 14005.30 of the Welfare and Institutions Code which provided that to the extent federal financial participation is available, the Department of Health Services shall extend eligibility for health care services under Medi-Cal to all recipients of aid under CalWORKs as well as those in the Section 1931(b) Only program.

For purposes of establishing requirements for the Section 1931(b) group, the July 16, 1996, AFDC provisions have been modified as of January 1, 1998, to the extent possible as permitted by PRWORA, in order to align the Section 1931(b) program with CalWORKs. Therefore, former AFDC rules will be referred to as the Section 1931(b) rules.

Assembly Bill (AB) 1107, Chapter 146, Statutes of 1999, expands the definition of the unemployed parent for purposes of establishing eligibility based upon deprivation of a child. Currently, if the principal wage earner works less than 100 hours per month, based upon the AFDC rules in effect July 16, 1996, or is considered unemployed under the terms of an existing federal waiver of the 100-hour rule for recipients of the Section 1931(b) Medi-Cal program, then deprivation exists for purposes of the child's eligibility. AB 1107 expands the definition of unemployment to include families with a total net nonexempt earned income of not more than 100 percent of the federal poverty level (FPL) as most recently calculated by the Federal Government. In addition, Senate Bill (SB) 708, chaptered on July 22, 1999, raises the income limits for the Section 1931(b) program to 100 percent of the FPL. The effective date for both changes is March 1, 2000. These procedures will be updated after that date.

Persons applying for Medi-Cal who are not on Public Assistance (PA) or other PA, must first be evaluated for the Section 1931(b) program prior to any other full scope Medi-Cal programs if they are otherwise eligible, e.g., meet residency, age, deprivation, income and property requirements. See the Section 5S of this Manual for more information about deprivation and implementation of the Section 1931(b) program.

2. MFBU (MEDI-CAL FAMILY BUDGET UNIT) COMPOSITION RULES

The MFBU for Section 1931(b) shall be the basic unit of persons considered in determining an individual's or family's eligibility and share of cost. Note: Sneede is applicable to the Section 1931(b) determination. Persons eligible for Section 1931(b) have a zero share of cost (SOC).

The following are some basic Section 1931(b) rules for the MFBU determination:

- All persons in the family who are living in the home and who are not already receiving a cash grant e.g., Supplemental Security Income (SSI), CalWORKs, In-Home Supportive Services (IHSS) are evaluated for Section 1931(b) in the same Medi-Cal Family Budget Unit (MFBU) regardless of whether or not they have linkage. Persons who are considered to be receiving Public Assistance (PA), or other PA are not in the MFBU except for those receiving Four Month Continuing and Transitional Medi-Cal benefits (see 50373 California Code of Regulations).

- If some persons in the household are receiving CalWORKs, those persons who are not eligible for CalWORKs or chose to not receive CalWORKs are considered to be eligible for Section 1931(b) without a determination. For example:

  1) Persons who are sanctioned from CalWORKs such as those who do not cooperate with work, child support rules, fleeing felons, or those who have reached their time limits are eligible for Section 1931(b) benefits.

  2) Persons who are not eligible to receive CalWORKs benefits because they do not have satisfactory immigration status, are eligible for restricted Section 1931(b) benefits.

  The only exceptions to this rule are persons with no deprivation, who do not meet the age requirements of a child (they are not under 18 or not enrolled in school and expected to graduate prior to age 19), or a non-needy caretaker relative who was not financially eligible for CalWORKs but is responsible for a child receiving CalWORKs. These individuals are not automatically eligible.

- Those persons who are in the same MFBU with other family members who are being evaluated for Section 1931(b), but are ineligible because they do not have linkage or who are not eligible after a Sneede determination, should be evaluated for the Medically Needy (MN), Medically Indigent (MI), or the Percent programs, if otherwise eligible.

- There must be at least one deprived child eligible for the MN/MI or Percent program with a zero SOC for a parent to be eligible for the Section 1931(b) program. NOTE: Beginning March 1, 2000, the definition of an unemployed parent will change. The principal wage earner who is an applicant for the Section 1931(b) and a PWE who is either and applicant or a recipient in the MN program may work over 100 hours if the family's net nonexempt earnings is not more than 100 percent of the FPL. Recipients of Section 1931(b) may continue to work over 100 hours if the meet the regular income and property requirements.

- An unborn may be used to increase the Section 1931(b) family size prior to the last trimester regardless of whether the unborn is deprived if the family is otherwise eligible, i.e., the mother has other deprived children or the minor mother is deprived because of her senior parent's unemployment, incapacity, etc.

- If the only deprived child is an unborn in the last trimester and the mother is being evaluated for Section 1931(b), the spouse or parent of the unborn is an ineligible member of the Section 1931(b) MBFU and is not eligible for Section 1931(b) until the birth of the unborn. He may be eligible for the MN or MI program. Continued Eligibility rules apply.

- The stepparent may chose to apply as an essential person if his/her spouse has a deprived child and the spouse wishes to apply regardless of whether or not he/she has non-deprived children; however, he/she must be included in the Section 1931(b) MFBU regardless of whether or not he/she wishes benefits. The stepparent may opt out of Section 1931(b) if only his spouse's separate children are applying for benefits. See the special property rules requirement described under Sneede property.

- The Section 1931(b) MFBU rules for a non-parent caretaker are similar to those of the MN program. If the caretaker relative is not the parent of the child, he or she is not required to be in the MFBU unless he or she wishes to be aided. If a caretaker also lives with a spouse, the spouse may not be aided nor is the spouse's income and property counted. This is similar to the rule for the MN program. The spouse may be aided under the MN program if he or she has other linkage such as aged, blind, or disabled. See the Medi-Cal Eligibility Procedures Manual Article 8D for more information.

- An exception to Section 1931(b) MFBU rules for caretaker relatives is if the non-parent relative is the caretaker of a child and the adult parent of that child is also living in the home. This is permitted under Section 1931(b) rules even though MN rules do not permit the caretaker relative to be aided when the parent is also living in the home. If an adult parent does not have care and control of his or her child (but his or her parental rights have not been terminated) and he/she is living with a caretaker relative of the adult parent's child such as grandparent who does have care and control, all persons are included in the MFBU if the caretaker wishes to be aided. See Example N.

- The minor mother who is living in the home of her parents must be deprived to be aided under Section 1931(b) rules. The Section 1931(b) MFBU is similar to that of the MN MFBU. There are two MFBU's. The minor mother is an eligible member in the MFBU with her unborn, parents and siblings. If the minor mother has a born child or if there is a second parent of the minor's child in the home, they are in a second MFBU and the minor mother is an ineligible member.

- If the minor mother has no other siblings in the household, the senior mother must have care and control of both the minor mother and the minor mother's child if she wishes to be aided. If these conditions are not met, she is an ineligible member in the minor mother's MFBU for the Section 1931(b) program. If these conditions are met, there are two MFBUs for the Section 1931(b) program which is similar to the treatment of the minor mother and the senior mother under regular MN rules. The senior parent is in the first MFBU with the minor mother and the minor mother is an ineligible member with his/her child in the second MFBU. The senior parent's income/property is never used to determine the eligibility for the minor parent's child. If the senior parent's income/property makes the minor parent ineligible, only the infant is eligible in the second MFBU. The senior parent(s) and the minor parent may be eligible for the MN or the Percent programs if they are not eligible for Section 1931(b). NOTE: Under this scenario where the minor has care and control of herself and/or infant the senior parent's income and property is not counted when the minor reaches age 18 regardless of whether or not she is enrolled in school and expected to graduate before age 19.

- If there are siblings in the home, the senior parent, siblings, and the minor parent are in the first MFBU. The issue of care and control is not an issue due to CalWORKs mandatory inclusion rules. Sneede rules apply if the siblings or the minor has income. The minor mother is an ineligible member of the second MFBU with her infant.

- If the deprived minor mother lives in the home with her parent(s), unmarried parent of her infant, and other siblings, the minor parent, senior parent(s), and siblings are in the first MFBU to determine eligibility. The minor mother is an ineligible member in the second MFBU with her infant or children and the second unmarried parent of her children. If the minor's child is an unborn, the unborn is in both MFBUs and may be counted in the family size prior to the last trimester. Counties may wish to review the Sneede Procedures Article 8F for minor mother examples.

- The Section 1931(b) MFBU for married minor children and their spouse living with the senior parent(s) is similar to the MFBU used for the MN program except that a minor under the MN/MI program is a person under 21. There may be three separate MFBU's depending on who wishes to be aided. Please review All County Welfare Directors Letter (ACWDL) 98-17 and 98-23.

- Persons who are eligible for Section 1931(b) may chose to be aided under certain other mandatory programs such as Pickle or a special limited benefits program such as the Qualified Medicare Beneficiary program, but they may not choose to be aided under the MN program.

3. SNEEDE REQUIREMENTS

The requirements of the Sneede lawsuit apply to the Section 1931(b) determination. That is, there is a mandatory exception to using the modified July 16, 1996 AFDC methodology. This exception relates to the Medi-Cal Sneede lawsuit which limits financial responsibility to a spouse for a spouse or a parent for a child. Such prohibitions did not exist in the AFDC program, but the Health Care Financing Administration indicated that Sneede must apply to the Section 1931(b) program as it does for all other Medi-Cal programs.

This means that if a family is determined ineligible for Section 1931(b) rules because of excess property or failure to meet the MBSAC income test, Sneede provisions apply if there is a Sneede class member. If only a parent is eligible for Section 1931(b) after Sneede is applied, there must be at least one deprived child who is eligible for another Medi-Cal program with a zero SOC for the parent to be eligible for Section 1931(b).

Generally, the same Sneede methodology used in the regular Medi-Cal program is followed under Section 1931(b) except for the following:

Income exceptions: Under regular Sneede, deductions for the aged, blind, and disabled are applicable. These deductions are not permitted in the Section 1931(b) Sneede determination. Under regular Sneede, the SOC is based on the Maintenance Need Income Level (MNIL) (or prorated amount), and a parental needs amount of $600 (which relates to the MNIL for one) is allowed for the parent before the parent allocates to others for whom that parent is responsible. Under Section 1931(b) Sneede, income eligibility is based on the MBSAC (or its prorated amount). As of July 1, 1999, the parent is allowed a $389 parental needs deduction. This amount changes when the MBSAC changes. Currently recipients are allowed a $240 plus one-half deduction for disability and earned income. Each Sneede member may receive the full $240 and one-half if applicable. This is similar to the Sneede rules for deductions under the MN/MI program where each Sneede member receives a full set of applicable deductions, e.g., the $20 any income disregard.

NOTE: Income limits will change beginning March 1, 2000. The new limits will raise the Section 1931(b) income limit for applicants to 100 percent of the FPL and give recipients a choice between either the present $240 and one-half deductions and the current MBSAC limit or 100 percent of the FPL.. These changes will affect the income limits for Section 1931(b) and Sneede income limits but will not change the basic MFBU or Sneede rules. More information about Section 1931(b) income rules can be reviewed in ACWDLs 98-43, 99-37, 99-39, 99-41, 99-54, future ACWDLs and in forthcoming Procedures.

A. Allocations from spouses or parents who have failed to qualify for Section 1931(b) due to Sneede or because of no deprivation.

- Spouses who are not eligible for Section 1931(b) may deduct all of their income if they are being determined as eligible or ineligible members of the MFBU for the Medically Needy (MN) program and their income was used to make their spouse eligible for Section 1931(b). Unmarried parents are not responsible relatives and may not deduct any income. NOTE: There should not be many instances where one spouse is ineligible because spouses are in the same Mini Budget Unit (MBU) and will pass or fail the income and property test together and the stepparent can chose to be an essential person. However, they mail fail due to linkage problems except when the pregnant woman has no other deprived children, is in her last trimester, and the other parent is not eligible until the deprived child is born. Unmarried parents are in separate MBUs and only keep $389 (parental needs), which is under the Section 1931(b) income limit. This limit will rise for applicants on March 1, 2000 to $687 (100 percent of the FPL for one). Unmarried parents usually pass the Section 1931(b) income test unless they have separate children who are in the same budget unit and those children have income allocated from that parent.

- A parent who is not eligible for Section 1931(b) may deduct the amount of their parental allocation to each child if that child is Section 1931(b) eligible when the parent is being determined for the other Medi-Cal programs as an eligible or ineligible member.

- No income or Sneede allocation from any eligible Section 1931(b) person is carried over to family members who did not pass Section 1931(b).

- Children who do not pass Section 1931(b) after a Sneede determination, or do not meet the age limitations or deprivation requirements may not deduct any of their income which was used in the Section 1931(b) determination because they are not responsible relatives. They must use their income again (if any), when they are determined for the MN or MI program. As noted above, no allocations from the parent in Section 1931(b) are carried over.

B. Percent Programs:

- When determining eligibility for the Percent programs for persons who did not pass Section 1931(b) or the MN/MI program with no share of cost after Sneede rules were applied or who have no deprivation and are being evaluated for the Percent programs, follow the regular MFBU composition and income rules as described in the Medi-Cal Procedures Manual Section 5K. Include the income from all

responsible persons and compare the net nonexempt income to the income limit for the entire family size. Follow the usual exceptions which are:

(1) If the stepparent is opting out of either Section 1931(b) or the MN program because only the spouse's separate children wish to be aided or,

(2) If the unmarried father does not wish to be aided with his/her girlfriend and her separate child and the only non-deprived mutual child is his unborn.

These persons were not part of the original Section 1931(b) or MN MFBU and are not included in the family size, nor is their income counted.

C. Property exception: Under regular Sneede, property eligibility is based on the property limits under the regular Medi-Cal program (or a prorated amount). These property limits increase according to family size. Because Sneede does not apply to MFBUs with only one person, the property limits under Section 1931(b) Sneede are the same as under regular Sneede. Because property limits are different under Section 1931(b) than under other Medi-Cal programs, persons who pass

Section 1931(b) are not included in the MFBU with other family members who are not eligible for Section 1931(b) and being determined for the MN or MI program. The exception to this rule is when their children or a pregnant spouse of parent is being evaluated for the Percent programs because there are no property limits for these programs.

Note: If the husband and the husband's separate child choose not to be aided, his separate plus one-half of the community property are exempt under the Section 1931(b) program. This exemption for property occurs even though his wife is requesting benefits. This rule does not apply to income. Income from the stepparent is counted unless only the wife's separate children are applying. If the husband's separate child wants benefits, then the husband is considered a parent and the stepparent exemption does not apply. More information about Section 1931(b) property rules are described in ACWDLs 98-43, 99-02, 99-03, 99-20, will be discussed in future Procedures.

4. EXAMPLES (Assume that all are applicants unless otherwise stated and the income limits are prior to the March 1, 2000 income changes)

Example A:

Father and two children age 6 and 8 are receiving Medi-Cal through CalWORKs. Mother is not eligible for CalWORKs because she does not meet the other CalWORKs requirements such as work, citizenship or time limits. Oldest child is not eligible for CalWORKs because he is age 20.

CalWORKs	1931(b)	MN/MI
Father	Mother	20-Year-Old
Child #1	<20 Year Old>	
Child #2		

There is no income or property determination required for the mother because she is presumed eligible for Section 1931(b) because the other family members are receiving CalWORKs. The 20-year-old is only shown in her budget unit to be consistent with the other examples. The 20 year old is in his own budget unit for the MN/MI because he is not eligible for Section 1931(b) because he is over the age limit.

Example B:

A father and two children age 6 and 8 were receiving CalWORKs. His spouse was not eligible for CalWORKs because she did not participate in with the CalWORKs work requirements and was receiving Medi-Cal under the Section 1931(b) program. The oldest child was not eligible for CalWORKs because he is age 20. The father and the two younger children have now been terminated from CalWORKs because of an increase in earnings from employment. Reevaluate the entire family for Section 1931(b). All but the 20 year old are considered recipients.

1931(b)	MN/MI
Father	20-year-old
Child #1 ($)	
Child #2	
Mom	
<20-year-old>	

Mother can be considered for 1931(b) because there are no work requirements for this program. The 20-year-old is included as an ineligible member of the Section 1931(b) MFBU, but also evaluated under regular Medi-Cal in his/her own MFBU. If the rest of the family is eligible for Section 1931(b), they may continue to receive no SOC Medi-Cal under this program. Should they later be terminated for an increase in earnings, they would be eligible for Transitional Medi-Cal; however, the 20 year old would not.

Example C: (Sneede/Poverty Level Programs Apply)

If the family in Example B above were not eligible for 1931(b), those who were not eligible for 1931(b) would be evaluated under 1931(b) Sneede rules because Child #1 has income. In this case Child #1 was found to be ineligible for 1931(b) after the Sneede determination.

Step One 1931(b)	Step Two Sneede	
	MBU#1	MBU #2
Father	Father	Child #1 ($)
Child #2	Mom	
Mom	Child #2	
Child #1 ($)	<20-year-old>	
<20-year-old>		
Assume everyone is ineligible .	Assume Father, Mom, and Child #2 are eligible, but child #1 is ineligible	

If the child is not eligible under 1931(b) Sneede, he/she would be evaluated with the 20-year-old under the MN program. Sneede would apply if they have an SOC.

Step Three MN/MI	Step Four Sneede MN/MI MBU #1	MBU#2
20-year-old Child #1($)	20-year-old	Child #1($)
Both children have a SOC	20-year-old has no SOC	Child #1 has a SOC

Step Five Poverty Level Program

All family members are included in the poverty level determination for child #1. Compare the net nonexempt income of the responsibly relatives to the poverty limit for five. If child #2 or the 20-year-old had income, their income would not be used, but the family size would remain the same.

<Father>
<Child #2>
<Mom>
Child #1($)
<20-year-old>
Assume Child #1 is eligible.

Example D:

Husband and wife with separate and mutual children apply for Medi-Cal. The children have no income. The wife is the principal wage earner and is employed over 100 hours; therefore, the mutual children are ineligible for Section 1931(b) because they are not deprived. This family was not terminated from CalWORKs or Section 1931(b) in the last four months; therefore, they are treated as applicants. Assume the family does applies prior to March 1, 2000; therefore, the PWE is considered employed. Since the separate children are deprived due to an absent parent, only the mutual children have no linkage.

1931(b)	MI Program
Husband	
Wife	
<Mutual Children>	Mutual Children
Wife's Separate Child	
Husband's Separate Child	

Assume family meets Section 1931(b) income and property limits. If the mutual children had an SOC in the MI program, they would be evaluated for the percent program using the responsible relative's family's income/property in the MFBU (the separate children have no income).

Example E:

If only the separate children of one parent wish to be aided, evaluate first for Section 1931(b) before evaluating under the MN/MI program. Use the Section 1931(b) parental needs allocation and compare the net nonexempt income of the MFBU to the Section 1931(b) limit for the family size of two. The wife is allowed to allocate to her spouse, separate child, and any non-deprived mutual children which reduces her total income. If the separate children have a SOC, determine eligibility for the Percent program and follow the regular Medi-Cal MFBU rules for that scenario as described in the Medi-Cal Procedures Manual 5K Page 6.

1931(b)

<Wife> (Net income minus parental needs and allocations to spouse and children)
Wife's Separate Children

Example F:

A single mother and her 5-year-old child with income apply for Medi-Cal prior to March 1, 2000. The mother has net nonexempt income of $589 and the child has net nonexempt income of $620. The county determines Section 1931(b) and then applies Sneede because the family is over the Section 1931(b) July 1999 limit.

MFBU		Sneede MBU No. 1		Sneede MBU No. 2	
Mother	$ 589	Mother	$389	Child	$620 + $200 from Mother
Child	$ 620	Total	$389	Total	$820
Total	$1,209	Limit	$390	Limit	$320
Limit	$ 639				

The mother passes Section 1931(b) because she keeps her parental needs amount of $389 and allocates the remainder to her child; however, the child is above the limit. The county then evaluates the child for the MN program. Since the child did not pass, he or she is evaluated for the 133 Percent program. There are no health premiums to add back.

MN		133 Percent Program	
Child	$620	Mother's Income	$ 589
Total	$620	Child's Income	$ 620
Limit	$600	Total	$1,209
		Limit (2)	$1,226

Child is eligible for the 133 Percent program. Mom is eligible for Section 1931(b) because she has a child who is eligible for Medi-Cal with no SOC.

Example G:

Married parents apply for Medi-Cal prior to March 1, 2000 for themselves, their two mutual children and the mother's two separate children, one of which is a 20-year-old child. The mother's net nonexempt income is $300 and the father's net nonexempt income is $589. Both are employed so there is no deprivation for their mutual children. The father chooses to be aided as an essential person. The mother's 20-year-old has unearned net nonexempt income of $500.

Section 1931(b) MFBU	
Mother	$ 300
Father	$ 589
<Mutual Child no. 1>	0
<Mutual Child no. 2>	0
Mother's 10-Year-Old	0
<Mother's 20-Year-Old>	$ 500
Total	$1,389
Limit for July 1999	$1,208

Since the family is over the Section 1931(b) limit and there are Sneede class members, Sneede rules apply. The Section 1931(b) Sneede parental needs amount at this time is $389. The mother keeps $300 and allocates nothing because she has less than $389. The father keeps $389 and allocates $200 ÷ 3 = $67 (the mother, mutual children no. 1 and no. 2).

MBU No. 1

Sneede

Mother	$300 + $67 from father	$367
Father	$389	$389
<Mutual Child no. 1>	$67 from father	$ 67
<Mutual Child no. 2>	$67 from father	$ 67
Total		$890
Limit		$942

The mother and father are eligible for Section 1931(b). The mutual children in this MBU have no linkage. They are evaluated for the MI or Percent programs.

MBU No. 2
Sneede

Mother's 10-year-old = $0

Mother's 10-year-old is eligible for 1931(b)

MBU No. 3
Sneede

<Mother's 20-Year-Old = $500>

This child is not eligible for 1931(b) due to age

The 20-year-old's income is used again because children are not responsible relatives. If a mutual child in MBU No. 1 had his or her own income, it also would be used again.

MN/MI

Mutual Child No. 1	$ 0
Mutual Child No. 2	$ 0
Mother's 20-Year-Old	$ 500
Total	$ 500
Limit	$ 934

All the children are eligible whether deprived or not.

NOTE: If Sneede applies to a MN/MI budget unit and there are no parents in the MFBU because they were eligible for Section 1931(b), the child(ren) in the MBU receive a full standard of need rather than a prorated income/property limit similar to when a parent is PA or other PA.

Example H:

Unmarried parents apply for Medi-Cal (prior to March 1, 2000) for themselves and their two mutual children and the mother's two separate children, one of which is a 20-year-old child. The mother's net nonexempt income is $300 and the father's net nonexempt income is $589. Both are employed so there is no deprivation for their mutual children. The father may not be aided as an essential person because he is not a stepparent. The mother's 20-year-old has unearned net nonexempt income of $500.

Section 1931(b) MFBU

Mother	$ 300
<Father>	$ 589
<Mutual Child #1>	0
<Mutual Child #2>	0
Mother's 10-Year-Old	0
<Mother's 20-Year-Old>	$ 500
Total	$1,389
Limit for July 1999	$1,208

Since the family is over the Section 1931(b) limit and there are Sneede class members, Sneede rules apply. The Section 1931(b) Sneede parental needs amount at this time is $389. The mother keeps $300 and allocates nothing because she has less than $389. The father keeps $389 and allocates $2,000 ÷ 2 = $100 (mutual children #1 and #2).

MBU No. 1 Sneede		MBU No. 2 Sneede		MBU 3 Sneede	
Mother	$300	<Father>	$389	<Mutual Child #1>	$100 (father)
Mother's 10 Year Old	0	Limit	$390	<Mutual Child #2>	$100 (father)
<Mother's 20-year-old>	0			Total	$200
Total	$300			Limit	$471
Limit	$793				

The mother and her separate 10-year-old are eligible for Section 1931(b). The father, mother's 20-year-old, and the mutual children have no linkage. Evaluate them for the MN/ MI.

MN/MI MFBU

<Father>	$ 589
Mutual Child No. 1	$ 0
Mutual Child No. 2	$ 0
Mother's 20-Year-Old	$ 500
Total	$1,089
Limit	$1,100

The mutual the children are eligible as MI's, the 20-year-old is eligible as an MN. The father is not eligible because he has no deprivation. The father's entire income is used again because he is not a responsible relative of any of the persons who are eligible for Section 1931(b).

Example I

An incapacitated married father with no income, his spouse, and their two children are terminated from CalWORKs due to the mother's unearned income. One of the children has unearned income of $50. This family is considered recipients for the Section 1931(b) determination.

1931(b) MFBU

Father	$ 0	
Mother	$1,000	net nonexempt income
Child #1	$ 50	net nonexempt income
Child #2	$ 0	
Total	$1,050	
Limit	$ 942	

Sneede Rules apply because the family is over the limit and there are Sneede class members.

Mother keeps the parental allocation of $389 and divides the remainder of $611 by 3 = $203.66

MBU #1
Sneede

Mother	$389	(Parental Needs)
Father	$203.66	(Mother)
Child #2	$203.66	(Mother)
Total	$796.32	
Limit	$793	

MBU#2

Child #1($)	$50+203.66
Total	$253.66
Limit	$265

None of the family members in MBU #1 are eligible. They are not eligible for Four Month Continuing Medi-Cal or the Transitional Medi-Cal programs. Evaluate them for the MN program. The mother may deduct her allocation to Child #1 who is eligible for Section 1931(b) in MBU #2.

MN MFBU

Mother	$796.34	($1,000 - $203.66 allocation to Child #1)
Father	0	(No allocation is carried over from Mother)
Child #2	0	(No allocation is carried over from Mother)
Total	796.34	
Limit	934.00	

This MFBU is eligible for the MN program.

Example J:

A married pregnant woman with no other children in her last trimester and the unemployed father of the unborn are applying for Medi-Cal. Dad has $700 in net non-exempt income.

Section 1931(b) MFBU

Mom	$ 0
Unborn	$ 0
<Dad>	$700
Total	$700
Limit for 3	$793

MN Program

Dad	$ 0
Total	$ 0
MNL Limit	$600

Mom is eligible for 1931(b). Dad is only eligible for the MN program. His income is not carried over to the MN program because he is a financially responsible relative to Mom and his income was used to make Mom eligible. Once the baby is born, he may be added to the Section 1931(b) program with no determination if there is no change in the family income. If the family income increases, a new determination is required. If the parents of the unborn were unmarried, Sneede would apply if Mom were ineligible for Section 1931(b). If Mom were then eligible, Dad could not deduct his income in the MN determination because unmarried parents are not responsible for one another. NOTE: The baby is protected from income increases until age one because of the Continued Eligibility program.

Example K

A married pregnant woman lives with her separate child, her employed spouse and their mutual child. All are requesting Medi-Cal. The spouse may be aided as an essential person (EP); however, his income is counted regardless of whether or not he wishes to be aided unless only his wife's separate child wishes to be aided.

Section 1931(b) MFBU

Mom	$ 0
Unborn	$ 0
Mom's Child	$ 300
<Mutual Child>	$ 0
Dad (EP)	$ 800
Total	$1,100
Limit for 5	$1,074

Section 1931(b) Sneede Determination

MBU #I		MBU #2	
Mom	$205.50	Mom's Child	$300
Dad (EP)	$389.00	Total	$300
<Mutual Child>	$205.50	Limit	$320
Unborn	$ 0		
Total	$800.00		
Limit for 4	$942.00		

Sneede Rules Apply. Dad keeps $389 and allocates the remainder to Mom and his mutual child. Mom's separate child keeps $300 of his/her own. All are eligible for Section 1931(b). NOTE: If Mom's separate child were not eligible for Section 1931(b) after the Sneede process, he or she would be evaluated for the MN program using only his or her income. If there were a parental allocation under Sneede, it is NOT carried over. If the child is still ineligible, then he or she should be evaluated for the poverty level programs, using only Mom's full net non-exempt income and his or her own. Compare this amount to the full family size of five.

Example L

A deprived minor parent and siblings apply based on the senior parent's unemployment. The minor parent's child is deprived through absence. Senior Dad has $2,000 per month net nonexempt unearned income. The minor mother has no income.

Section 1931(b) MFBU #1

Senior Mom	$ 0
Senior Dad	$2,000
Minor Mom	0
Sibling #1	0
Sibling #2	0
Total	$2,000
Limit (5)	$1,074

Section 1931(b) MFBU #2

<Minor Mom>	$0
Minor Mom's Infant	$0
Total	$0
Limit (2)	$639

Only the infant is eligible for Section 1931(b). The other family members in the first MFBU should be evaluated for the MN or the Percent programs.

Example M

The 16-year-old minor mother and her 17-year-old unemployed boyfriend who is the parent of her child live with her senior parents. The senior parents are employed. The boyfriend is unemployed. The minor mother has care and control of herself and her child. We will assume that there is no in-kind income to the boyfriend.

Section 1931(b) MFBU #1

<Senior Mom>	$3,000
<Senior Dad>	$ 50
Minor Mom	$ 0
Total	$3,050
Limit (3)	$1,074

Section 1931(b) MFBU #2

<Minor Mom>	$0
Minor Dad	$0
Infant	$0
Total	$0

All the persons in MFBU No. 1 are ineligible. The minor Mom should be evaluated for the MN. She would be in her own MFBU. If she has a SOC, evaluate her for the 100 Percent program. The minor Dad and the infant are eligible for Section 1931(b).

Example N

A 26-year-old adult parent who does not have care and control of her minor child lives with her minor child and her mother (grandmother of the child). The grandmother has care and control of the minor child. All are requesting aid. Under the Section 1931(b) program, a caretaker relative with care and control of a child may be aided even if the adult parent is in the home. If the MFBU has excess income or property, modified Sneede rules apply and only the income and property of the parent is allocated to the child. If the grandmother is ineligible, he/she is not eligible under the MN program if the adult parent is being aided in Section 1931(b) with the parent's child. The MN program does not allow a caretaker to be aided if the adult parent of a minor child is living in the home.

Section 1931(b) MFBU

Grandmother	$620
Adult Parent	$100
Child	$ 0
Total	$720
Limit (3)	$793

All are eligible for Section 1931(b).

Example O

Same example as N; however, the parent has an income of $500 which makes the family ineligible for Section 1931(b). Apply Sneede rules:

Section 1931(b) Sneede MBU#1		Section 1931(b) Sneede MBU #2	
Grandmother	$620	Adult Parent	$500
Total	$620	Child	$ 0
Limit (1)	$390	Total	$500
		Limit for (2)	$639

Grandmother is not eligible for Section 1931(b) or any other MN program unless she has linkage of her own such as aged, blind, or disabled. The adult parent and child are eligible for Section 1931(b).

EXAMPLE P

A 20-year-old parent has care and control of her child, lives with her senior parents, and all are requesting Medi-Cal. There is absent parent deprivation for the child. The 20-year-old is considered an adult in the Section 1931(b) determination. The senior parents are not in the Section 1931(b) MFBU because they are not caretaker relatives of a Section 1931(b) child. The senior parents may be aided under the MN program if the 20-year-old is deprived by the senior parent's incapacity, unemployment, or they are aged, blind, or disabled; otherwise the 20-year-old is MI.

Section 1931(b) MFBU	MN MFBU
20-Year-Old Parent	Senior Dad
20-Year-Old Parent's Child	Senior Mom

If the 20-year-old and her child are not eligible for Section 1931(b), all family members may be evaluated for the MN program following the minor mother MN/MI MFBU rules since the 20 year old is still considered a child. Assume the senior parent is incapacitated.

MN MFBU #1	MN MFBU#1
Senior Dad	<20-year-old Parent>
Senior Mom	20-year-old Parent's Child
20-year-old Parent	

NOTE: If the senior parents had care and control of the minor child in this example, follow Example N for the Section 1931(b) determination.

EXAMPLE Q

Married couple with no mutual children. The wife has a separate child. The stepfather requests to be aided as essential person. He may not opt out because his wife wants to be aided; however, he can be an ineligible member of the MFBU if he does not want to be aided. The wife has no income. The child has net income of $100. The stepfather has $2,000 net nonexempt income per month.

Section 1931(b)

Stepfather	$2,000
Mother	$ 0
Separate Child	$ 100
Total	$2,100
Limit	$ 942

Since the family is ineligible for Section 1931(b), Sneede rules apply. The stepfather keeps $389 and allocates the remainder to his wife = $1,611. The mother has no income and allocates nothing to her child.

Section 1931(b) Sneede
MBU#1

Stepfather	$ 389
Mother	$0 + $1,611
Total	$2,000
Limit	$639

Section 1931(b) Sneede
MFBU #2

Separate Child	$100
Total	$100
Limit	$320

The child is eligible; however, the mother and stepfather are not eligible for Section 1931(b) and should be evaluated for the MN and county programs. The stepfather is not eligible for the MN program as an essential person. NOTE: He may only be aided as an MN if his wife is incapacitated since he has no deprived child.

MN

<Stepfather>	$2,000
Mother	0
Total	$2,000
Limit	934

The mother has a share of cost of $1,066.

EXAMPLE R

Married parents with two mutual children (assume Dad is incapacitated) apply for Medi-Cal. Mom earns $800/month and the father receives $200/month in Social Security disability income. Child #1 (who is not in school) has earnings of $300/month. Child #2 receives $400/month in Social Security Disability. For purposes of determining the Section 1931 eligibility of applicants, Dad's $200 and Child #2's $400/month in Social Security disability payments are treated as unearned income (the $240 and one-half deduction does not apply to applicants.) Therefore, the father's $200 and child #2's $400 disability income amounts result in the family having $600 in net unearned income. Subtract the $90 work expense deduction from Mom's earning and Child #1's earnings, leaving Mom with $710 in net earnings and Child #1 with $210 in net earnings. Add these two amounts together to get the family's total net earnings: $920. Add the family's total net earnings ($920) and the family's total net unearned income ($600) together to get the family's total net nonexempt income: $1,520. Compare this to the current Section 1931 Program income limit for a family of 4: $942.

Section 1931(b) MFBU

Mom	$ 710
Dad	$ 200
Child #1$	$ 210
Child #2$	$ 400
Total	$1,520
Limit	$ 942

As applicants, the family is ineligible because their net nonexempt income of $1,520 exceeds the Section 1931 income limit of $942 for the family. Sneede rules would then apply. Mom keeps the $389 parental needs allocation and divides the remainder of $321 by 3 = $107. Dad's income is below the parental needs limit; therefore, he keeps the entire $200.

Section 1931(b) Sneede

MBU #1		MBU #2		MBU #3	
Mother	$389	Child #1$	$210 + $107	Child #2$	$400+$107
Father	$200+ $107	Total	$317	Total	$507
Total	$696	Limit	$265	Limit	$265
Limit	$639				

None are eligible for Section 1931(b). The family should evaluated for the MN program, regular Sneede if applicable, and the children for the Percent programs, if applicable. See the attached worksheets for this example.

State of California—Health And Human Services Agency | Department of Health Services

SEC. 1931 APPLICANT PROGRAM BUDGET SHEET FOR DETERMINING APPLICANT NET NON-EXEMPT INCOME AND SECTION 1931 INCOME ELIGIBILITY

Case Name: Example R.		County District	County Use
☐ New App. ☐ Redetermination ☐ Change ☐ Retro Elig. ☐ Correction		Effective Elig. Date for this budget: Mo. Yr.	

Name MFBU Member #1: Mother		Name MFBU Member #6:	Other Coverage
Name MFBU Member #2: Father		Name MFBU Member #7:	
Name MFBU Member #3: Child #1		Name MFBU Member #8:	
Name MFBU Member #4: Child #2		Name MFBU Member #9:	
Name MFBU Member #5:		Name MFBU Member #10:	

1	Enter unearned income of each MFBU member, then total for MFBU (include non-exempt disability-based income here)	Total MFBU Unearned Income: $600	Unearned income MFBU member #1: $0 +	Unearned income MFBU member #3: $0 +
			Unearned income MFBU member #2: $200 +	Unearned income MFBU member #4: $400
2	☐ Educational Expense (§ 50547)	- $0	Exempt Income (List exempt income here):	
3	☐ $50 Support Received (§50554.5)	- $0		
4	Remaining non-exempt unearned income	Box 4 = $600		
5	Enter earnings of each MFBU member, subtract $90 work expense deduction from each, then total remainders for MFBU	Total MFBU Earnings: $920	Earnings, MFBU member #1: $800 - $90 wrk exp ded = $710	Earnings, MFBU member #2: $0 - $90 wrk exp ded = $0
			Earnings, MFBU member #3: $300 - $90 wrk exp ded = $210	Earnings, MFBU member #4: $0 - $90 wrk exp ded = $0

6	☐ Dependent Care Deduction (§ 50553.5)	- $0	County Use
7	Remaining Non-exempt earned Income	Box 7 = $920	
8	Total Remaining Income: Non-exempt unearned income & Non-exempt earned income (lines 4+7)	$1520	
9	☐ Child/Spousal Support Pymts (§ 50554)	- $0	
10	☐ Allocation to excluded children (§ 50558)	- $0	
11	☐ Allocation to PA family member (§50557)	± $0	
12	Total MFBU Net-nonexempt Income (rounded down to the nearest dollar)	= $1520	

13	Sec. 1931 income limit for family	$942	
	If income from line 12 is less than limit from line 13, family is income eligible	☐ Eligible	☑ Not Eligible: if no Sneede-eligible class member, evaluate for other Medi-Cal programs; if Sneede- eligible class member, evaluate for Sec. 1931 under Sneede.

Eligibility Worker Signature	Worker Number	Computation Date	County Use

MC 176M-A –1931 Group –APPL (5/99)

State of California—Health And Human Services Agency | Department of Health Services

SECTION 1931 (b) SNEEDE V. KIZER NET NONEXEMPT INCOME DETERMINATION AND MINI BUDGET UNIT (MBU) DETERMINATION - APPLICANT

Case Name Example R	County District	County use
Case Number	Effective Date Month Year	

CASE TYPE: APPLICANT

PART 1

NOTE: The only deduction applicable to the Section 1931(b) program is the deduction for Educational Expenses, as provided in Section 50547, Title 22, California Code of Regulations.

ENTER NAME OF EACH MFBU MEMBER (Do not list unborns)	Name Mother	Name Father	Name Child #1	Name Child #2	Name
Person Type	☑ Parent A or ☐ Caretaker Relative	☑ Parent B or ☐ Caretaker Relative	☑ Child	☑ Child	☐ Child
A. NONEXEMPT UNEARNED INCOME (EXCLUDING DISABILITY-BASED INCOME)					
1. Source and amount of nonexempt unearned income *:					
2. Net child/spousal support received ①					
3. In-kind income (IKI) ②					
4. Income available from PA/other PA (see MC 175-6, line A 4).					
5. Total nonexempt unearned income (add lines 1, 2, 3 and 4).					

* Sources include, net income from property, Social Security nondisability payments, etc.

① Child/Spousal Support Payments Received — Child support is income to the child, not to the parent or caretaker relative.

Divide the $50 per month child/spousal support deduction by the number of persons for whom the income is intended. Any unused remainder will be prorated among the remaining persons who still have support payments to apply against the deduction.

② Unearned IKI — Prorate the unearned IKI among the persons who receive the income. Example: Medi-Cal Family Budget Unit (MFBU) of four receives free housing. Use IKI for four and each person receives one-fourth of the IKI. Add an unborn's share of IKI to the pregnant woman's share. If the pregnant woman is Public Assistance (PA)/Other PA, and not in the MFBU, give the unborn's share to the father of the unborn if he is in the MFBU.

Child/Spousal support and/or IKI computations:

B. DISABILITY-BASED INCOME					
6. Source and amount of disability-based income. Private disability benefits - father SSDI - Child #2		200		400	
C. NONEXEMPT EARNED INCOME					
7. Source and amount of nonexempt earned income (include TWC, SDI and earned IKI). Earnings - Mother/Child #1	800		300		
8. $90 work expense deduction.	90		90		

9. Remaining nonexempt earned income (subtract line 8 from line 7)	710		210		
10. Child care deduction					
11. Other deductions.					
12. Total deductions (add lines 10 and 11).					
13. Total net nonexempt earned income (subtract line 12 from line 9).	710		210		
D. TOTAL COUNTABLE INCOME					
14. Total countable nonexempt unearned income (line 5).					
15. Total countable disability-based income (line 6).		200		400	
16. Total countable nonexempt earned income (line 13).	710		210		
17. Income allocated from LTC/B&C person to family members at home (from MC 176W, Part B, or from MC 175-7, line C 2).					
18. Total countable income (add lines 14, 15, 16 and 17).	710	200	210	400	
E. TOTAL NET COUNTABLE INCOME AFTER OTHER DEDUCTIONS					
19. Court-ordered child support or alimony.					
20. Income used to determine PA eligibility (MC 175-6, line B.3 or B 4).					
21. Other deductions:					
22. Total deductions (add lines 19, 20 and 21).					
23. Total net countable income (subtract line 22 from line 18) Enter this amount on MC 175-4 if no parent in MFBU. If parent in MFBU, continue.	710	200	210	400	
F. PARENTAL/SPOUSAL (P/S) ALLOCATION COMPUTATION (Skip if no parent in MFBU)					
24. P/S ~~allocation~~ own needs (subtract $1 from MBSAC for one person).	389	200			
25 Total unearned in-kind income, income from PA or income allocated from LTC/B&C spouse (add lines 3, 4 and 17).	0	0			
26. Parent's total net nonexempt income (subtract line 25 from line 23)	710	200			
27. Parent's net nonexempt income less P/S allocation (subtract line 24 from line 26); if negative, enter 0.	321	0			
28. Number of persons for whom Parent A is responsible (MC 175-2, Section A). DO NOT COUNT PARENT A.	3				
29. Number of persons for whom Parent B is responsible (MC 175-2, Section B). DO NOT COUNT PARENT B.		3			
30. Child's natural/adoptive parent - check if Parent A and/or B (see MC 175-2).			☑A ☑B	☑A ☑B	☐A ☐B
31 Parent A's allocation to spouse (if any) and natural /adopted children (divide parent A's line ~~26~~ 27 by line 28 and enter in applicable box). Do not enter under Parent B if unmarried		107	107	107	

32. Parent B's allocation to spouse (if any) and natural /adopted children (divide parent B's line 28 by line 29 and enter in applicable box). Do not enter under Parent A if unmarried.	0				
33. Enter the lesser of either line 24 or 26.	389	0			
34. Parent's total net nonexempt income (add lines 25, 33, and 31 or 32).	389	307			
35. Child's total net nonexempt income (add lines 23, 31 and 32) enter on MC 175-4.			317	507	

PART 2

SECTION 1931(b) MBU DETERMINATION - PROPERTY AND MINIMUM BASIC STANDARD OF ADEQUATE CARE (MBSAC)

☑ SECTION 1931(B) MBSAC TEST ☐ SECTION 1931(B) PROPERTY DETERMINATION

INSTRUCTIONS

1. Include unborn in the mother's MBU and property limit/MBSAC income level unless mother is married, and only her separate children want Medi-Cal. If pregnant woman is PA/Other PA, include the unborn in the spouse's or father's MBU.
2. Do not include an excluded child
3. Do not list MBU members in more than one MBU.
4. If any MBU has excess property, check to see if Medi-Cal linkage still exists for other family members.
5. Property determinations: enter the allocation for each spouse from MC 324, line 29.
6. Enter each person's net nonexempt income from lines 34 or 35.

MBU NUMBER 1

Person name/number	Net Nonexempt ☐ Property ☑ Income
1. child #1	317
2.	
3.	
4.	
5.	
6.	
TOTAL	317
MBU's ☐ Property Limit ☑ MBSAC	265

(Check one)
☐ Excess property - FAIL
☑ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER 2

Person name/number	Net Nonexempt ☐ Property ☑ Income
1. child #2	507
2.	
3.	
4.	
5.	
6.	
TOTAL	507
MBU's ☐ Property Limit ☐ MBSAC	265

(Check one)
☐ Excess property - FAIL
☑ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER 3	
Person name/number	Net Nonexempt ☐ Property ☑ Income
1. Mother	389
2. Father	307
3.	
4.	
5.	
6.	
TOTAL	696
MBU's ☐ Property Limit ~~☑~~ MBSAC	639

(Check one)
☐ Excess property - FAIL
☑ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

EXAMPLE S

Pregnant minor age 17 and senior mother apply for Medi-Cal. There is no senior father in the home. The pregnant minor has care and control of herself. There are no other siblings in the household. The senior mother has net nonexempt income of $700 per month. The minor has $50 net nonexempt income per month.

Section 1931(b) MFBU

<Senior mother>	$700
Minor Mother	$ 50
<Unborn>	N/A
Total Income	$750
Limit	$793

Senior mother is an ineligible member since she does not have care and control of the minor. She can apply for the MN program in an MFBU by herself (similar to what would occur if the minor mother was receiving CalWORKs). When the minor turns 18, the senior mother's income and property are no longer counted in the Section 1931(b) MFBU. If the senior's income or property makes the minor mother ineligible, all could apply for the MN program since there is assumed care and control if the minor mother lives with the senior mother. If there is a SOC, the minor and her unborn should be evaluated for the Percent program.

NOTE: If the unborn was a born child and the senior mother's income made the minor mother ineligible for Section 1931(b), the born child would be evaluated using only the minor mother's income.

5. CHARTS AND FORMS

a) Section 1931(b) Income Limits Effective July 1, 1999
b) Section 1931(b) Sneede Prorated Income Standard and Property Levels –July 1, 1998
c) Section 1931(b) Sneede Prorated Income Standard and Property Levels –July 1, 1998
d) Section 1931(b) Sneede Prorated Income Standard and Property Levels – January 1, 1998 to June 30, 1998
e) Applicant Budget Sheet Net Non-Exempt Income [MC 176M-A -1931 Group- APPL (5/99)]
f) Recipient Budget Sheet Net Non-Exempt Income [MC 176M-A –1931 Group – RECIP (5/99)
g) Section 1931 Program Worksheet: Applying the $240 &1/2 Deduction to Recipient Families with Three or More Persons with Earnings [MC 176M-A –1931 Group – 3+earner (5/99)]
h) Section 1931(b) Sneede Net Nonexempt Income Determination – Applicant [MC175-3I.2A(4/99) Group]
i) Section 1931(b) Sneede Net Nonexempt Income Determination – Recipient [MC 175-3I.2R (4/99) 1931 Group]
j) Property Reserve Work Sheet MC 176P (1/99)
k) Section 1931(b) Sneede Property Work Sheet [MC 324 (9/98) 1931 Group]
l) Vehicle Determination Work Sheet for 1931 Group [MC 176 P-V (10/98) 1931 Group]

Section 1931(b) Determinations: Sneede v. Kizer
Prorated Income Standard and Property Levels
- July 1, 1999 -

I. MBU Contains an Adult - May also Include an Unborn

Person Type	1931(b) Income	Property
Single Parent	$390	$3,000
Single Parent with Unborn	639	3,000
Married Couple -Two Adults	639	3,000
Married Couple with Unborn	793	3,150
Unmarried Couple - Each Unmarried Partner	390	3,000

II. MBU Contains Adult(s) and Child(ren)

Allow the full non-Sneede Section 1931(b) income/property limits for the MBU based on the number of individuals in the MBU.

III. MBU Contains a Nonparent Caretaker Relative, or Child(ren) with No Parents Living in the Home, or Child(ren) Whose Parent is PA/Other PA and Not in the MFBU

Each MBU receives full non-Sneede 1931(b) income/property limit based on the number of persons in each MBU. If there is a pregnant minor in the MFBU, include the unborn in the pregnant minor's MBU.

IV. MBU Contains Only Children Who Live with One or Both Parents (Not Stepparents) and They Are in the Same MFBU. (Do not include a parent who is PA/other PA and not in the MFBU. Also, if there is a pregnant minor in the MFBU, her unborn is considered as another child in the pregnant minor's MBU.)

No. of Children in MBU	One Parent		Two Parents	
	Prorated Income	Prorated Property	Prorated Income	Prorated Property
1	$ 320	$1,500	$ 265	$1,050
2	529	2,100	471	1,650
3	707	2,475	645	2,070
4	860	2,760	806	2,400
5	1,007	3,000	948	2,679
6	1,138	3,215	1,084	2,925
7	1,265	3,413	1,219	3,150
8	1,393	3,600	1,361	3,360
9	1,531	3,780	1,404	3,437
10*	1,560	3,819	1,441	3,500

*NOTE: Add $14 for each additional child after 10 to Section 1931(b) income standards to determine prorated income standards. $\frac{\text{No. Children in MBU}}{\text{Parent(s) + No. Children in MBU}} \times$ 1931(b) Income Standard for Parent(s) + Child(ren) in MBU = Prorated income

Section 1931(b) Determinations: Sneede v. Kizer
Prorated Income Standard and Property Levels
- July 1, 1998 -

I. MBU Contains an Adult - May also Include an Unborn

Person Type	1931(b) Income	Property
Single Parent	$381	$3,000
Single Parent with Unborn	624	3,000
Married Couple -Two Adults	624	3,000
Married Couple with Unborn	775	3,150
Unmarried Couple - Each Unmarried Partner	381	3,000

II. MBU Contains Adult(s) and Child(ren)

Allow the full non-Sneede Section 1931(b) income/property limits for the MBU based on the number of individuals in the MBU.

III. MBU Contains a Nonparent Caretaker Relative, or Child(ren) with No Parents Living in the Home, or Child(ren) Whose Parent is PA/Other PA and Not in the MFBU

Each MBU receives full non-Sneede 1931(b) income/property limit based on the number of persons in each MBU. If there is a pregnant minor in the MFBU, include the unborn in the pregnant minor's MBU.

IV. MBU Contains Only Children Who Live with One or Both Parents (Not Stepparents) and They Are in the Same MFBU. (Do not include a parent who is PA/other PA and not in the MFBU. Also, if there is a pregnant minor in the MFBU, her unborn is considered as another child in the pregnant minor's MBU.)

No. of Children in MBU	One Parent		Two Parents	
	Prorated Income	Prorated Property	Prorated Income	Prorated Property
1	$ 312	$1,500	$ 259	$1,050
2	517	2,100	460	1,650
3	690	2,475	630	2,070
4	840	2,760	787	2,400
5	984	3,000	926	2,679
6	1,111	3,215	1,059	2,925
7	1,236	3,413	1,191	3,150
8	1,361	3,600	1,330	3,360
9	1,496	3,780	1,372	3,437
10*	1,524	3,819	1,409	3,500

*NOTE: Add $14 for each additional child after 10 to Section 1931(b) income standards to determine prorated income standards. $\frac{\text{No. Children in MBU}}{\text{Parent(s) + No. Children in MBU}}$ X 1931(b) Income Standard for Parent(s) + Child(ren) in MBU = Prorated income

Section 1931(b) Determinations: Sneede v. Kizer
Prorated Income Standard and Property Levels
- January 1, 1998 - June 30, 1998 -

I. MBU Contains an Adult - May also Include an Unborn

Person Type	1931(b) Income	Property
Single Parent	$370	$3,000
Single Parent with Unborn	607	3,000
Married Couple -Two Adults	607	3,000
Married Couple with Unborn	754	3,150
Unmarried Couple - Each Unmarried Partner	370	3,000

II. MBU Contains Adult(s) and Child(ren)

Allow the full non-Sneede Section 1931(b) income/property limits for the MBU based on the number of individuals in the MBU.

III. MBU Contains a Nonparent Caretaker Relative(s) or Child(ren) with No Parents Living in the Home, or Child(ren) Whose Parent is PA/Other PA and Not in the MKBU

Each MBU receives full non-Sneede 1931(b) income/property limit based on the number of persons in each MBU. If there is a pregnant minor in the MFBU, include the unborn in the pregnant minor's MBU.

IV. MBU Contains Only Children Who Live with One or Both Parents (Not Stepparents) and They Are in the Same MKBU (Do not include a parent who is PA/other PA and not in the MFBU). Also, if there is a pregnant minor in the MKBU, her unborn is considered as another child in the pregnant minor's MBU.

No. of Children in MBU	One Parent		Two Parents	
	Prorated Income	Prorated Property	Prorated Income	Prorated Property
1	$ 304	$1,500	$ 252	$1,050
2	503	2,100	448	1,650
3	672	2,475	612	2,070
4	816	2,760	765	2,400
5	956	3,000	900	2,679
6	1,080	3,215	1,030	2,925
7	1,202	3,413	1,159	3,150
8	1,324	3,600	1,293	3,360
9	1,455	3,780	1,334	3,437
10*	1,482	3,819	1,370	3,500

*NOTE: Add $14 for each additional child after 10 to Section 1931(b) income standards to determine prorated income standards. $\frac{\text{No. Children in MBU}}{\text{Parent(s) + No. Children in MBU}} \times$ 1931(b) Income Standard for Parent(s) + Child(ren) in MBU = Prorated income

State of California—Health And Human Services Agency

Department of Health Services

SEC. 1931 APPLICANT PROGRAM BUDGET SHEET FOR DETERMINING APPLICANT NET NON-EXEMPT INCOME AND SECTION 1931 INCOME ELIGIBILITY

Case Name	County District	County Use
☐ New App. ☐ Redetermination ☐ Change ☐ Retro Elig. ☐Correction	Effective Elig. Date for this budget: Mo. Yr.	

Name MFBU Member #1:	Name MFBU Member #6:	Other Coverage
Name MFBU Member #2:	Name MFBU Member #7:	
Name MFBU Member #3:	Name MFBU Member #8:	
Name MFBU Member #4:	Name MFBU Member #9:	
Name MFBU Member #5	Name MFBU Member #10:	

1	Enter unearned income of each MFBU member, then total for MFBU (include non-exempt disability-based income here)	Total MFBU Unearned Income $ _____	Unearned income MFBU member #___ $_____ + Unearned income MFBU member #___ $_____ +	Unearned income MFBU member #___ $_____ . + Unearned income MFBU member #___ $_____
2	☐ Educational Expense (§ 50547)	- $_____	Exempt Income (List exempt income here):	
3	☐ $50 Support Received (§50554.5)	- $_____		
4	Remaining non-exempt unearned income	Box 4 = $ _____		
5	Enter earnings of each MFBU member, subtract $90 work expense deduction from each, then total remainders for MFBU	Total MFBU Earnings: $_____	Earnings, MFBU member #____ $_____ - $90 wrk exp ded = $_____	Earnings, MFBU member #____ $_____ - $90 wrk exp ded = $_____
			Earnings, MFBU member #____ $_____ - $90 wrk exp ded = $_____	Earnings, MFBU member #____ $_____ - $90 wrk exp ded = $_____
6	☐ Dependent Care Deduction (§ 50553.5)	- $_____	County Use	
7	Remaining Non-exempt earned Income	Box 7 = $_____		
8	Total Remaining Income: Non-exempt unearned income & Non-exempt earned income (lines 4+7)	$ _____		
9	☐ Child/Spousal Support Pymts (§ 50554)	- $ _____		
10	☐ Allocation to excluded children (§ 50558)	- $ _____		
11	☐ Allocation to PA family member (§50557)	± $ _____		
12	Total MFBU Net-nonexempt Income (rounded down to the nearest dollar)	= $ _____		
13	Sec. 1931 income limit for family	$ _____		
	If income from line 12 is less than limit from line 13, family is income eligible	☐ Eligible	☐ Not Eligible: if no Sneede-eligible class member, evaluate for other Medi-Cal programs; if Sneede- eligible class member, evaluate for Sec. 1931 under Sneede.	

Eligibility Worker Signature	Worker Number	Computation Date	County Use

MC 176M-A – 1931 Group – APPL (5/99)

State of California—Health And Human Services Agency — Department of Health Services

SEC. 1931 RECIPIENT PROGRAM BUDGET SHEET FOR DETERMINING RECIPIENT NET NON-EXEMPT INCOME AND SECTION 1931 INCOME ELIGIBILITY

Case Name	County District	County Use
☐ New App. ☐ Redetermination ☐ Change ☐ Retro Elig. ☐Correction	Effective Elig. Date for this budget:	Mo. / Yr.

Name MFBU Member #1:	Name MFBU Member #6:	Other Coverage
Name MFBU Member #2:	Name MFBU Member #7:	
Name MFBU Member #3:	Name MFBU Member #8:	
Name MFBU Member #4.	Name MFBU Member #9.	
Name MFBU Member #5:	Name MFBU Member #10:	

1	Enter unearned income of each MFBU member, then total for MFBU (do not include non-exempt disability-based income here)	Total MFBU Unearned Income = $ _____	Unearned income MFBU member #___ $_____ + / Unearned income MFBU member #___ $_____ +	Unearned income MFBU member #___ $_____ + / Unearned income MFBU member #___ $_____ +
2	☐ Educational Expenses (§ 50547)	- $ _____	Exempt Income (List exempt income here):	
3	☐ $50 Support Received (§ 50554.5)	- $ _____		
4	Remaining non-exempt unearned income	Box 4 = $ _____		
5	Enter disability-based income (DBI) of each MFBU member, then total for MFBU	Total MFBU Disability-Based Income: $_____	DBI of MFBU member # _____ $_____ + / DBI of MFBU member #_____ $_____ +	DBI of MFBU member #_____ $_____ + / DBI of MFBU member #_____ $_____
6	$240 deduction	- $240		
7	Remaining Non-exempt disability-based income (DBI) (if deduction exceeds disability based income, enter "0".)	Box 7 = $ _____	7a Unused $240 (line 6-line 5; if negative enter 0)	$_____ (Unused $240)
8	Enter earnings for up to two MFBU members, then total for MFBU (if 3 or more persons with earnings, skip lines 8 & 9 and proceed to worksheet for 3+ earners)	Total MFBU Earnings: $_____	Earnings of MFBU member #____ $_____ +	Earnings of MFBU member #____ $_____

9	☐ Unused $240 deduction (from box 7a)	- $ _____	14	Total Remaining Non-exempt unearned income, Non-exempt disability-based income & Non-exempt earned income(total from box 4, 7, & 13)	$ _____
10	Remaining non-exempt earned income (or from line 12 worksheet); if deduction exceeds earned income, enter "0."	= $ _____	15	☐ Child/Spousal Support Pymts (§ 50554)	- $_____
11	50% deduction (divide amount in line 10 by 2)	= $ _____	16	☐ Allocation to excluded children (Sec. 50558)	- $_____
12	☐ Dependent Care Deduction (§ 50553.5)	- $ _____	17	☐ Allocation to PA family member (§50557)	± $_____
13	Remaining Non-exempt earned income	Box 13 = $ _____	18	Total MFBU Net-nonexempt income (rounded down to the nearest dollar)	= $ _____
			19	Sec. 1931 income limit for family	$ _____
	If income from line 18 is less than limit from line 19, family is income eligible	☐ Eligible	☐ Not Eligible: if no Sneede-eligible class member, evaluate or other Medi-Cal programs; if Sneede- eligible class member, evaluate for Sec. 1931 under Sneede.		

Eligibility Worker Signature	Worker Number	Computation Date	County Use

MC 176M-A –1931 Group –RECIP (5/99)

State of California—Health And Human Services Agency | Department of Health Services

SECTION 1931 (b) SNEEDE V. KIZER NET NONEXEMPT INCOME DETERMINATION AND MINI BUDGET UNIT (MBU) DETERMINATION - APPLICANT

Case Name	County District	County use
Case Number	Effective Date Month / Year	

CASE TYPE: APPLICANT

PART 1

NOTE: The only deduction applicable to the Section 1931(b) program is the deduction for Educational Expenses, as provided in Section 50547, Title 22, California Code of Regulations.

ENTER NAME OF EACH MFBU MEMBER (Do not list unborns)	Name	Name	Name	Name	Name
Person Type	☐ Parent A or ☐ Caretaker Relative	☐ Parent B or ☐ Caretaker Relative	☐ Child	☐ Child	☐ Child
A. NONEXEMPT UNEARNED INCOME (EXCLUDING DISABILITY-BASED INCOME)					
1. Source and amount of nonexempt unearned income *:					
2. Net child/spousal support received.①					
3. In-kind income (IKI) ②					
4. Income available from PA/other PA (see MC 175-6, line A.4).					
5. Total nonexempt unearned income (add lines 1, 2, 3 and 4).					

* Sources include: net income from property, Social Security nondisability payments, etc.

① Child/Spousal Support Payments Received — Child support is income to the child, not to the parent or caretaker relative.

Divide the $50 per month child/spousal support deduction by the number of persons for whom the income is intended. Any unused remainder will be prorated among the remaining persons who still have support payments to apply against the deduction.

② Unearned IKI — Prorate the unearned IKI among the persons who receive the income. Example: Medi-Cal Family Budget Unit (MFBU) of four receives free housing. Use IKI for four and each person receives one-fourth of the IKI. Add an unborn's share of IKI to the pregnant woman's share. If the pregnant woman is Public Assistance (PA)/Other PA, and not in the MFBU, give the unborn's share to the father of the unborn if he is in the MFBU.

Child/Spousal support and/or IKI computations:

B. DISABILITY-BASED INCOME					
6. Source and amount of disability-based income.					
C. NONEXEMPT EARNED INCOME					
7. Source and amount of nonexempt earned income (include TWC, SDI and earned IKI).					
8. $90 work expense deduction.					

9. Remaining nonexempt earned income (subtract line 8 from line 7).					
10. Child care deduction.					
11. Other deductions.					
12. Total deductions (add lines 10 and 11).					
13. Total net nonexempt earned income (subtract line 12 from line 9).					
D. TOTAL COUNTABLE INCOME					
14. Total countable nonexempt unearned income (line 5).					
15. Total countable disability-based income (line 6).					
16. Total countable nonexempt earned income (line 13).					
17. Income allocated from LTC/B&C person to family members at home (from MC 176W, Part B, or from MC 175-7, line C.2).					
18. Total countable income (add lines 14, 15, 16 and 17).					
E. TOTAL NET COUNTABLE INCOME AFTER OTHER DEDUCTIONS					
19. Court-ordered child support or alimony.					
20. Income used to determine PA eligibility (MC 175-6, line B.3 or B.4).					
21. Other deductions:					
22. Total deductions (add lines 19, 20 and 21).					
23. Total net countable income (subtract line 22 from line 18). Enter this amount on MC 175-4 if no parent in MFBU. If parent in MFBU, continue.					
F. PARENTAL/SPOUSAL (P/S) ALLOCATION COMPUTATION (Skip if no parent in MFBU)					
24. P/S allocation (subtract $1 from MBSAC for one person). own needs					
25. Total unearned in-kind income, income from PA or income allocated from LTC/B&C spouse (add lines 3, 4 and 17).					
26. Parent's total net nonexempt income (subtract line 25 from line 23).					
27. Parent's net nonexempt income less P/S allocation (subtract line 24 from line 26); if negative, enter 0.					
28. Number of persons for whom Parent A is responsible (MC 175-2, Section A). DO NOT COUNT PARENT A.					
29. Number of persons for whom Parent B is responsible (MC 175-2, Section B). DO NOT COUNT PARENT B.					
30. Child's natural/adoptive parent - check if Parent A and/or B (see MC 175-2).			☐A ☐B	☐A ☐B	☐A ☐B
31. Parent A's allocation to spouse (if any) and natural /adopted children (divide parent A's line 27 by line 28 and enter in applicable box). Do not enter under Parent B if unmarried.					

32. Parent B's allocation to spouse (if any) and natural /adopted children (divide parent B's line 28 27 by line 29 and enter in applicable box). Do not enter under Parent A if unmarried.					
33. Enter the lesser of either line 24 or 26.					
34. Parent's total net nonexempt income (add lines 25, 33, and 31 or 32).					
35. Child's total net nonexempt income (add lines 23, 31 and 32) enter on MC 175-4.					

PART 2

SECTION 1931(b) MBU DETERMINATION - PROPERTY AND MINIMUM BASIC STANDARD OF ADEQUATE CARE (MBSAC)

☐ SECTION 1931(B) MBSAC TEST ☐ SECTION 1931(B) PROPERTY DETERMINATION

INSTRUCTIONS

1. Include unborn in the mother's MBU and property limit/MBSAC income level unless mother is married, and only her separate children want Medi-Cal. If pregnant woman is PA/Other PA, include the unborn in the spouse's or father's MBU.
2. Do not include an excluded child.
3. Do not list MBU members in more than one MBU.
4. If any MBU has excess property, check to see if Medi-Cal linkage still exists for other family members.
5. Property determinations: enter the allocation for each spouse from MC 324, line 29.
6. Enter each person's net nonexempt income from lines 34 or 35

MBU NUMBER _____

Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____

Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

State of California—Health And Human Services Agency | Department of Health Services

SECTION 1931 (b) SNEEDE V. KIZER NET NONEXEMPT INCOME DETERMINATION AND MINI BUDGET UNIT (MBU) DETERMINATION - RECIPIENT

Case Name	County District	County use
Case Number	Effective Date Month / Year	

CASE TYPE: RECIPIENT

PART 1

NOTE: The only deduction applicable to the Section 1931(b) program is the deduction for Educational Expenses, as provided in Section 50547, Title 22, California Code of Regulations.

ENTER NAME OF EACH MFBU MEMBER (Do not list unborns)	Name	Name	Name	Name	Name
Person Type	☐ Parent A or ☐ Caretaker Relative	☐ Parent B or ☐ Caretaker Relative	☐ Child	☐ Child	☐ Child
A. NONEXEMPT UNEARNED INCOME (EXCLUDING DISABILITY-BASED INCOME)					
1. Source and amount of nonexempt unearned income *:					
2. Net child/spousal support received ①					
3. In-kind income (IKI) ②					
4. Income available from PA/other PA (see MC 175-6, line A.4).					
5. Total nonexempt unearned income (add lines 1, 2, 3 and 4).					

* Sources include: net income from property, Social Security nondisability payments, etc.

① Child/Spousal Support Payments Received — Child support is income to the child, not to the parent or caretaker relative.

Divide the $50 per month child/spousal support deduction by the number of persons for whom the income is intended. Any unused remainder will be prorated among the remaining persons who still have support payments to apply against the deduction.

② Unearned IKI — Prorate the unearned IKI among the persons who receive the income. Example: Medi-Cal Family Budget Unit (MFBU) of four receives free housing. Use IKI for four and each person receives one-fourth of the IKI. Add an unborn's share of IKI to the pregnant woman's share. If the pregnant woman is Public Assistance (PA)/Other PA, and not in the MFBU, give the unborn's share to the father of the unborn if he is in the MFBU

Child/Spousal support and/or IKI computations:

B. DISABILITY-BASED INCOME					
6. Source and amount of disability-based income. (Continue to line 7, even if no disability income.)					
7. Section 1931(b) $240 deduction.					
8. Remaining nonexempt disability-based income (subtract line 7 from line 6). Enter 0 if negative.					
9. Unused Section 1931(b) deduction. (If line 6 is 0, enter $240. Otherwise, subtract line 6 from line 7. Enter 0 if negative.)					

C. NONEXEMPT EARNED INCOME					
10. Source and amount of nonexempt earned income (include TWC, SDI and earned IKJ).					
11. Section 1931(b) deduction from line 9.					
12. Remaining nonexempt earned income (subtract line 11 from line 10).					
13. 50% earned income deduction (one-half of line 12)					
14. Child care deduction.					
15. Other deductions.					
16. Total deductions (add lines 13, 14 and 15).					
17. Total net nonexempt earned income (subtract line 16 from line 12).					
D. TOTAL COUNTABLE INCOME					
18. Total countable nonexempt unearned income (line 5).					
19. Total countable disability-based income (line 8).					
20. Total countable nonexempt earned income (line 17)					
21. Income allocated from LTC/B&C person to family members at home (from MC 176W, Part B, or from MC 175-7, line C.2).					
22. Total countable income (add lines 18, 19, 20 and 21).					
E. TOTAL NET COUNTABLE INCOME AFTER OTHER DEDUCTIONS					
23. Court-ordered child support or alimony.					
24. Income used to determine PA eligibility (MC 175-6, line B.3 or B.4).					
25. Other deductions:					
26. Total deductions (add lines 23, 24 and 25).					
27. Total net countable income (subtract line 26 from line 22). Enter this amount on MC 175-4 if no parent in MFBU. If parent in MFBU, continue.					
F. PARENTAL/SPOUSAL (P/S) ALLOCATION COMPUTATION (Skip if no parent in MFBU)					
28. P/S allocation (subtract $1 from MBSAC for one person). Own needs					
29. Total unearned in-kind income, income from PA or income allocated from LTC/B&C spouse (add lines 3, 4 and 21).					
30. Parent's total net nonexempt income (subtract line 29 from line 27).					
31. Parent's net nonexempt income less P/S allocation (subtract line 28 from line 30); if negative, enter 0.					
32. Number of persons for whom Parent A is responsible (MC 175-2, Section A). DO NOT COUNT PARENT A.					

33. Number of persons for whom Parent B is responsible (MC 175-2, Section B). DO NOT COUNT PARENT B.					
34. Child's natural/adoptive parent - check if Parent A and/or B (see MC 175-2).			☐A ☐B	☐A ☐B	☐A ☐B
35. Parent A's allocation to spouse (if any) and natural /adopted children (divide parent A's line 31 by line 32 and enter in applicable box). Do not enter under Parent B if unmarried.					
36. Parent B's allocation to spouse (if any) and natural /adopted children (divide parent B's line 31 by line 33 and enter in applicable box) Do not enter under Parent A if unmarried.					
37. Enter the lesser of either line 28 or 30.					
38. Parent's total net nonexempt income (add lines 29, 37, and 35 or 36).					
39. Child's total net nonexempt income (add lines 27, 35 and 36) enter on MC 175-4.					

PART 2

SECTION 1931(b) MBU DETERMINATION - PROPERTY AND MINIMUM BASIC STANDARD OF ADEQUATE CARE (MBSAC)

☐ SECTION 1931(B) MBSAC TEST ☐ SECTION 1931(B) PROPERTY DETERMINATION

INSTRUCTIONS

1. Include unborn in the mother's MBU and property limit/MBSAC income level unless mother is married, and only her separate children want Medi-Cal. If pregnant woman is PA/Other PA, include the unborn in the spouse's or father's MBU.
2. Do not include an excluded child
3. Do not list MBU members in more than one MBU.
4. If any MBU has excess property, check to see if Medi-Cal linkage still exists for other family members
5. Property determinations: enter the allocation for each spouse from MC 324, line 29.
6. Enter each person's net nonexempt income from lines 38 or 39

MBU NUMBER _____		
Person name/number	Net Nonexempt ☐ Property ☐ Income	
1.		
2.		
3.		
4.		
5.		
6.		
TOTAL		
MBU's ☐ Property Limit ☐ MBSAC		

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
_ TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2	
3.	
4.	
5	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

State of California—Health And Human Services Agency Department of Health Services

SEC. 1931 PROGRAM WORKSHEET: APPLYING THE $240 & ½ DEDUCTION TO RECIPIENT FAMILIES WITH 3 OR MORE PERSONS WITH EARNINGS

	NAME:				
1	**Family's Non-exempt earned income**	$_____	$_____	$_____	$_____
2	**Non-exempt earned income of two highest earners**	$_____			
3	**Unused $240 deduction** (from box 7a Recipient Budget Sheet [MC176M 1931 RECIP]; if result is 0 or less, enter 0)	- $_____			
4	**Remaining Non-exempt earned income of two highest earners** (if deduction exceeds earned income, enter "0.")	= $_____			
5	**Non-exempt earned income of 3rd highest earner**	$_____			
6	$120 deduction	- $120			
7.	**His/her remaining Non-exempt earned income** (if deduction exceeds earned income, enter "0.")	= $_____			
8	**Non-exempt earned income of 4th highest earner**	$_____			
9	$120 deduction	-$120			
10	**His/her remaining Non-exempt earned income** (if deduction exceeds earned income, enter "0 ")	= $_____			
11	**Other remainder Non-exempt earned income** (If 5 or more persons with earnings, enter Total of their remainder earned income after subtracting $120 from earnings of each.) (If deduction exceeds earned income, enter "0 ")	= $_____			
12	**Non-exempt earned income Subtotal** (total of all remainder earned income: add lines 4, 7, 10 & 11 this worksheet); enter amount on Section 1931 Program Budget Sheet (line 10)	= $_____			

MC 176M-A –1931Group– 3+earner (5/99)

State of California—Health And Human Services Agency | Department of Health Services

SECTION 1931 (b) SNEEDE V. KIZER NET NONEXEMPT INCOME DETERMINATION AND MINI BUDGET UNIT (MBU) DETERMINATION - APPLICANT

Case Name	County District	County use
Case Number	Effective Date Month / Year	

CASE TYPE: APPLICANT

PART 1

NOTE: The only deduction applicable to the Section 1931(b) program is the deduction for Educational Expenses, as provided in Section 50547, Title 22, California Code of Regulations.

ENTER NAME OF EACH MFBU MEMBER (Do not list unborns)	Name	Name	Name	Name	Name
Person Type	☐ Parent A or ☐ Caretaker Relative	☐ Parent B or ☐ Caretaker Relative	☐ Child	☐ Child	☐ Child
A. NONEXEMPT UNEARNED INCOME (EXCLUDING DISABILITY-BASED INCOME)					
1. Source and amount of nonexempt unearned income *:					
2 Net child/spousal support received.①					
3. In-kind income (IKI).②					
4. Income available from PA/other PA (see MC 175-6, line A.4).					
5 Total nonexempt unearned income (add lines 1, 2, 3 and 4).					

* Sources include: net income from property, Social Security nondisability payments, etc.

① Child/Spousal Support Payments Received — Child support is income to the child, not to the parent or caretaker relative.

Divide the $50 per month child/spousal support deduction by the number of persons for whom the income is intended. Any unused remainder will be prorated among the remaining persons who still have support payments to apply against the deduction.

② Unearned IKI — Prorate the unearned IKI among the persons who receive the income. Example: Medi-Cal Family Budget Unit (MFBU) of four receives free housing. Use IKI for four and each person receives one-fourth of the IKI. Add an unborn's share of IKI to the pregnant woman's share. If the pregnant woman is Public Assistance (PA)/Other PA, and not in the MFBU, give the unborn's share to the father of the unborn if he is in the MFBU.

Child/Spousal support and/or IKI computations:

B. DISABILITY-BASED INCOME					
6. Source and amount of disability-based income.					
C. NONEXEMPT EARNED INCOME					
7. Source and amount of nonexempt earned income (include TWC, SDI and earned IKI).					
8 $90 work expense deduction.					

9. Remaining nonexempt earned income (subtract line 8 from line 7).					
10. Child care deduction.					
11. Other deductions.					
12. Total deductions (add lines 10 and 11).					
13. Total net nonexempt earned income (subtract line 12 from line 9).					
D. TOTAL COUNTABLE INCOME					
14. Total countable nonexempt unearned income (line 5).					
15. Total countable disability-based income (line 6).					
16. Total countable nonexempt earned income (line 13).					
17. Income allocated from LTC/B&C person to family members at home (from MC 176W, Part B, or from MC 175-7, line C.2).					
18. Total countable income (add lines 14, 15, 16 and 17).					
E. TOTAL NET COUNTABLE INCOME AFTER OTHER DEDUCTIONS					
19. Court-ordered child support or alimony					
20 Income used to determine PA eligibility (MC 175-6, line B.3 or B.4).					
21. Other deductions:					
22. Total deductions (add lines 19, 20 and 21).					
23. Total net countable income (subtract line 22 from line 18). Enter this amount on MC 175-4 if no parent in MFBU. If parent in MFBU, continue.					
F. PARENTAL/SPOUSAL (P/S) ALLOCATION COMPUTATION (Skip if no parent in MFBU)					
24. P/S allocation (subtract $1 from MBSAC for one person).					
25. Total unearned in-kind income, income from PA or income allocated from LTC/B&C spouse (add lines 3, 4 and 17).					
26. Parent's total net nonexempt income (subtract line 25 from line 23).					
27. Parent's net nonexempt income less P/S allocation (subtract line 24 from line 26); if negative, enter 0.					
28. Number of persons for whom Parent A is responsible (MC 175-2, Section A). DO NOT COUNT PARENT A.					
29. Number of persons for whom Parent B is responsible (MC 175-2, Section B). DO NOT COUNT PARENT B.					
30. Child's natural/adoptive parent - check if Parent A and/or B (see MC 175-2).			☐A ☐B	☐A ☐B	☐A ☐B
31. Parent A's allocation to spouse (if any) and natural /adopted children (divide parent A's line 26 by line 28 and enter in applicable box). Do not enter under Parent B if unmarried.					

32. Parent B's allocation to spouse (if any) and natural /adopted children (divide parent B's line 26 by line 29 and enter in applicable box). Do not enter under Parent A if unmarried.					
33. Enter the lesser of either line 24 or 26.					
34. Parent's total net nonexempt income (add lines 25, 33, and 31 or 32).					
35. Child's total net nonexempt income (add lines 23, 31 and 32) enter on MC 175-4.					

PART 2

SECTION 1931(b) MBU DETERMINATION - PROPERTY AND MINIMUM BASIC STANDARD OF ADEQUATE CARE (MBSAC)

☐ SECTION 1931(B) MBSAC TEST ☐ SECTION 1931(B) PROPERTY DETERMINATION

INSTRUCTIONS

1. Include unborn in the mother's MBU and property limit/MBSAC income level unless mother is married, and only her separate children want Medi-Cal. If pregnant woman is PA/Other PA, include the unborn in the spouse's or father's MBU.
2. Do not include an excluded child
3. Do not list MBU members in more than one MBU.
4. If any MBU has excess property, check to see if Medi-Cal linkage still exists for other family members
5. Property determinations: enter the allocation for each spouse from MC 324, line 29.
6. Enter each person's net nonexempt income from lines 34 or 35.

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

State of California—Health And Human Services Agency

Department of Health Services

SECTION 1931 (b) SNEEDE V. KIZER NET NONEXEMPT INCOME DETERMINATION AND MINI BUDGET UNIT (MBU) DETERMINATION - RECIPIENT

Case Name	County District	County use
Case Number	Effective Date Month / Year	

CASE TYPE: RECIPIENT

PART 1

NOTE: The only deduction applicable to the Section 1931(b) program is the deduction for Educational Expenses, as provided in Section 50547, Title 22, California Code of Regulations.

ENTER NAME OF EACH MFBU MEMBER (Do not list unborns)	Name	Name	Name	Name	Name
Person Type	☐ Parent A or ☐ Caretaker Relative	☐ Parent B or ☐ Caretaker Relative	☐ Child	☐ Child	☐ Child
A. NONEXEMPT UNEARNED INCOME (EXCLUDING DISABILITY-BASED INCOME)					
1. Source and amount of nonexempt unearned income *:					
2. Net child/spousal support received.①					
3. In-kind income (IKI).②					
4. Income available from PA/other PA (see MC 175-6, line A.4)					
5 Total nonexempt unearned income (add lines 1, 2, 3 and 4).					

* Sources include: net income from property, Social Security nondisability payments, etc

① Child/Spousal Support Payments Received — Child support is income to the child, not to the parent or caretaker relative.

Divide the $50 per month child/spousal support deduction by the number of persons for whom the income is intended. Any unused remainder will be prorated among the remaining persons who still have support payments to apply against the deduction.

② Unearned IKI — Prorate the unearned IKI among the persons who receive the income. Example: Medi-Cal Family Budget Unit (MFBU) of four receives free housing. Use IKI for four and each person receives one-fourth of the IKI. Add an unborn's share of IKI to the pregnant woman's share. If the pregnant woman is Public Assistance (PA)/Other PA, and not in the MFBU, give the unborn's share to the father of the unborn if he is in the MFBU.

Child/Spousal support and/or IKI computations:

B. DISABILITY-BASED INCOME					
6. Source and amount of disability-based income. (Continue to line 7, even if no disability income.)					
7. Section 1931(b) $240 deduction.					
8. Remaining nonexempt disability-based income (subtract line 7 from line 6). Enter 0 if negative.					
9 Unused Section 1931(b) deduction. (If line 6 is 0, enter $240. Otherwise, subtract line 6 from line 7 Enter 0 if negative.)					

C. NONEXEMPT EARNED INCOME					
10. Source and amount of nonexempt earned income (include TWC, SDI and earned IKJ).					
11. Section 1931(b) deduction from line 9.					
12. Remaining nonexempt earned income (subtract line 11 from line 10).					
13. 50% earned income deduction (one-half of line 12).					
14. Child care deduction.					
15. Other deductions.					
16. Total deductions (add lines 13, 14 and 15).					
17. Total net nonexempt earned income (subtract line 16 from line 12).					
D. TOTAL COUNTABLE INCOME					
18. Total countable nonexempt unearned income (line 5).					
19. Total countable disability-based income (line 8).					
20 Total countable nonexempt earned income (line 17).					
21. Income allocated from LTC/B&C person to family members at home (from MC 176W, Part B, or from MC 175-7, line C.2).					
22. Total countable income (add lines 18, 19, 20 and 21).					
E. TOTAL NET COUNTABLE INCOME AFTER OTHER DEDUCTIONS					
23. Court-ordered child support or alimony.					
24. Income used to determine PA eligibility (MC 175-6, line B.3 or B.4).					
25. Other deductions'					
26. Total deductions (add lines 23, 24 and 25).					
27 Total net countable income (subtract line 26 from line 22). Enter this amount on MC 175-4 if no parent in MFBU. If parent in MFBU, continue.					
F. PARENTAL/SPOUSAL (P/S) ALLOCATION COMPUTATION (Skip if no parent in MFBU)					
28. P/S allocation (subtract $1 from MBSAC for one person).					
29. Total unearned in-kind income, income from PA or income allocated from LTC/B&C spouse (add lines 3, 4 and 21).					
30. Parent's total net nonexempt income (subtract line 29 from line 27).					
31. Parent's net nonexempt income less P/S allocation (subtract line 28 from line 30); if negative, enter 0.					
32. Number of persons for whom Parent A is responsible (MC 175-2, Section A) DO NOT COUNT PARENT A.					

33. Number of persons for whom Parent B is responsible (MC 175-2, Section B). DO NOT COUNT PARENT B.					
34. Child's natural/adoptive parent - check if Parent A and/or B (see MC 175-2).			☐A ☐B	☐A ☐B	☐A ☐B
35. Parent A's allocation to spouse (if any) and natural /adopted children (divide parent A's line 31 by line 32 and enter in applicable box). Do not enter under Parent B if unmarried.					
36. Parent B's allocation to spouse (if any) and natural /adopted children (divide parent B's line 31 by line 33 and enter in applicable box). Do not enter under Parent A if unmarried.					
37. Enter the lesser of either line 28 or 30.					
38. Parent's total net nonexempt income (add lines 29, 37, and 35 or 36).					
39. Child's total net nonexempt income (add lines 27, 35 and 36) enter on MC 175-4.					

PART 2

SECTION 1931(b) MBU DETERMINATION - PROPERTY AND MINIMUM BASIC STANDARD OF ADEQUATE CARE (MBSAC)

☐ SECTION 1931(B) MBSAC TEST ☐ SECTION 1931(B) PROPERTY DETERMINATION

INSTRUCTIONS

1. Include unborn in the mother's MBU and property limit/MBSAC income level unless mother is married, and only her separate children want Medi-Cal. If pregnant woman is PA/Other PA, include the unborn in the spouse's or father's MBU.
2. Do not include an excluded child.
3. Do not list MBU members in more than one MBU.
4. If any MBU has excess property, check to see if Medi-Cal linkage still exists for other family members.
5. Property determinations: enter the allocation for each spouse from MC 324, line 29.
6. Enter each person's net nonexempt income from lines 38 or 39.

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6	
_ TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

MBU NUMBER _____	
Person name/number	Net Nonexempt ☐ Property ☐ Income
1.	
2.	
3.	
4.	
5.	
6.	
TOTAL	
MBU's ☐ Property Limit ☐ MBSAC	

(Check one)
☐ Excess property - FAIL
☐ Income ineligibility at or exceeds MBSAC - Property eligible - FAIL
☐ Income eligible - below MBSAC - Property eligible - PASS

State of California—Health and Human Services Agency — Department of Health Services

PROPERTY RESERVE WORK SHEET

Name _____ Case Number _____ Month _____

I. NONEXEMPT OTHER REAL PROPERTY (ORP)

A. Determine market value and encumbrances of ORP on reverse, and list in 1 and 2. Note: If ORP owned jointly with persons not in MFBU, list only the share of market value and encumbrances of persons in MFBU.

1. Market Value per Section 50412	$
2. Encumbrances per Section 50413	$
3. Net Market Value (line 1 minus line 2)	$
4. Life Estate (determine value per Section 50442 and procedure 9A)	$
5. Net Market Value of notes, mortgages, deeds of trust from sale of real property owned by MFBU member	$
6. Total net ORP (add lines 3, 4, and 5) Enter in Column I, line C1	$

B. INCOME FROM NONEXEMPT ORP

1. Rental Income ☐ Monthly ☐ Yearly, if yes, $_____ ÷ 12	$
2. Upkeep and Repair	
a. $_____ x .15	
Line B1 $	
b. + $4.17 $ 4.17	
c. Line a + b $	
d. Actual upkeep and repair $	
e. Greater of line 2c or 2d	$
3. Interest ☐ Monthly ☐ Yearly, if yes, $_____ ÷ 12	$
4. Taxes and Assessments ☐ Monthly ☐ Yearly, if yes, $_____ ÷ 12	$
5. Utilities ☐ Monthly ☐ Yearly, if yes, $_____ ÷ 12	$
6. Insurance ☐ Monthly ☐ Yearly, if yes, $_____ ÷ 12	$
7. Total expenses (add lines 2e through 6)	$
8. Net rental income (line 1 minus line 7) Enter on MC 176 M Column I or II)	$
9. Income from ORP other than rental income (Section 50508) (Enter on MC 176 M, Column I or II)	$
10. Total income from ORP (line 8 plus line 9)	$

C. UTILIZATION—NONEXEMPT ORP

1. Total Net Market Value of ORP (from Col. 1, line A6)	$
2. 6% per year utilization requirement	$ X.005
3. Income needed $	

4. a. Is B10 greater than C3? Yes ☐ No ☐ If yes, utilization met. If no, recompute rental income with actual upkeep and repair, if lower.
   b. Is B10 now greater than or equal to C3? Yes ☐ No ☐ If yes, utilization met.
   c. If still no, is utilization period implemented? Yes ☐ No ☐

5. Exemption: If 4a, b, or c is yes, enter lesser of $6,000 or line C1. Otherwise, enter Ø. $

II. PROPERTY RESERVE: USE REVERSE TO ITEMIZE OR TO PROVIDE DETAILS

1. Excess value ORP	
a. Enter from Col. I, line C1	
b. Enter from Col. I, line C5	
c. Line 1a—1b	$
2. Notes, mortgages, deeds of trust NOT from the sale of real property owned by MFBU member	$
3. Liquid assets [money, checking/savings accounts, stocks, bonds, etc. (other than for business)]	$
4. CSV of nonexempt life insurance	$
5. Burial plots, vaults, or crypts not for family use and not exempt as ORP	$
6. Value of designated burial funds in excess of $1,500	$
7. Nonbusiness vehicles, boats, vans, or trailers; other than one exempt for transportation	

Item	Market Value e.g., DMV license fee x 50 or appraised value	Encumbrance	
			$
			$
			$
8. Jewelry, not exempt and valued over $100			$
9. Other countable property			$
10. Subtotal property reserve (add lines 1 through 9)			$
11. Long-term care insurance exemption (benefits paid)			–$
12. Community spouse resource allowance			–$
13. Total property reserve (line 10 minus 11 and 12)			$
14. Number of persons in MFBU _____ Property limit for MFBU			$

15. Is line 14 greater than line 13?
☐ Yes—property eligible
☐ No—excess property—ineligible
Explain property requirements.
* If "NO," complete Sneede Screening below

III. SNEEDE: PROPERTY SCREENING

If excess property and MFBU includes child(ren) complete the following:

DOES THE MFBU INCLUDE:	YES	NO
1. A stepparent with property?	☐	☐
2. An unmarried couple with mutual child(ren)?	☐	☐
3. A child with own nonexempt property?	☐	☐
4. A nonparent caretaker relative in the same MFBU with the child(ren) for whom care is provided and the caretaker wants Medi-Cal?	☐	☐

* If "NO" to all of the above, stop here.
* If "YES" to any of the above and:
(1) the MFBU includes a parent, complete MC175-2, MC175-3P, and MC175-4.
(2) the MFBU does *not* include a parent, complete MC175-3P and MC175-4.

Eligibility Worker Signature	Worker Number	Computation Date	County Use

MC 176 P (1/99)

State of California—Health and Welfare Agency | Department of Health Services

SECTION 1931(b)
SNEEDE V. KIZER
PROPERTY WORK SHEET

Case name	County district	County use
Case number	**Effective date**	
	Month	Year

INSTRUCTIONS

- List all nonexempt property from MC 176P-1931.
- If property is owned by more than one person, equally divide the net market value by the number of owners unless evidence is provided to rebut the division.
- Joint bank accounts: If available to anyone in the MFBU, do not count the money in a joint account against the MFBU more than once. Equally prorate the bank account among the owners in the MFBU (subject to rebuttal).
- Stepparent property is exempt.

I. ALLOCATION FROM SPOUSE/PARENT

A. For a married couple, enter their total community property in Column II. Enter each spouse's separate property in Column III.

B. For an unmarried couple or a single parent, enter their separate property in Column III; leave Column II blank.

LIST EXEMPT PROPERTY AND NAME OF OWNER	I. LIST ONLY THE PARENT'S NONEXEMPT PROPERTY	II. COMMUNITY PROPERTY	III. SEPARATE PROPERTY	
			Parent A	Parent B
	1. Nonexempt Other Real Property			
	2. Checking			
	3. Savings			
	4. Other			
	5. Cash			
	6. Nonexempt Vehicle			
	7. Other			
	8.			
	9.			
	10.			
	11. Subtotal Net Nonexempt Property	$	$	$
	12. Enter each spouse's share of community property (divide line 11, Column II, by 2)		$	$
	13. Parent's total net nonexempt property (add lines 11 and 12)			
	14. Number of persons for whom each parent is responsible (see totals on MC 175-2)		/	
	15. Allocation to each person for whom parent is responsible (divide line 13 by line 14)		(A) $ Enter on line 27.	(B) $ Enter on line 28.

MC 324 (9/98) 1931 Group

State of California—Health and Welfare Agency

Department of Health Services

VEHICLE DETERMINATION WORK SHEET FOR 1931 GROUP

Case name

Case number

DIRECTIONS	VEHICLE NUMBER ONE	VEHICLE NUMBER TWO	VEHICLE NUMBER THREE
List all vehicles owned by anyone in the MFBU. NOTE: Complete additional work sheets if more than three vehicles.	Make _____ Model _____ Year _____	Make _____ Model _____ Year _____	Make _____ Model _____ Year _____

STEP ONE—*Only Licensed Vehicles and Unlicensed Vehicles on Indian Reservation Which Do Not Require Licensing. For All Other Vehicles, Go to Step Two.*

A vehicle used for any reason listed below is exempt.

1. On the job or for income producing purposes even if only on a seasonal basis or temporarily unemployed.
2. Long distance travel essential to individual's employment, e.g., traveling sales, migrant farm worker moving from job to job.
3. Home (only one vehicle per household).
4. Transportation of disabled individual living in the home.
5. Transportation of primary fuel/water for the home.

Is vehicle exempt? If yes, list reason and STOP. If NO, go to Step Two.	☐ Yes ☐ No Reason: _____	☐ Yes ☐ No Reason: _____	☐ Yes ☐ No Reason: _____
STEP TWO—*Only Vehicles Not Exempt in Step One*			
A. Enter estimate of Fair Market Value (FMV).	FMV $_____	FMV $_____	FMV $_____
B. Licensed Only—*If Unlicensed, Go to Step Two (C).* Enter excess FMV (estimate of FMV minus $4,650). If *zero*, then exempt, STOP. If not zero, go to Step Two (C).	− 4,650 Excess FMV $_____	− 4,650 Excess FMV $_____	− 4,650 Excess FMV $_____
C. All Remaining Vehicles—Enter encumbrance (amount owed).	Amount owed $_____	Amount owed $_____	Amount owed $_____
D. Determine equity value (EV) of vehicle (FMV of vehicle from Step Two (A) minus encumbrance in Step Two (C)).	EV $_____	EV $_____	EV $_____
STEP THREE—Countable Vehicle Value			
A. Compare Step Two (B) and Step Two (D). Enter the *lesser value.*	*Check One* ☐ Excess FMV $_____ *or* ☐ EV $_____	*Check One* ☐ Excess FMV $_____ *or* ☐ EV $_____	*Check One* ☐ Excess FMV $_____ *or* ☐ EV $_____
B. Enter $1,500 in the column under the one vehicle with the highest *equity value.* If excess FMV is the lesser amount, enter zero. Enter zero in all columns where $1,500 is not entered.	− $_____	− $_____	− $_____
C. Subtract Step Three (B) from Step Three (A) and enter result. If zero, then car is exempt. If not zero, then enter amount on Property Reserve Work Sheet (MC 176 P (Back) 1931).	− $_____	− $_____	− $_____

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