

SNEEDE V. KIZER PROPERTY WORK SHEET

Case name	County district	County use
Case number		Effective date Mo. Yr.

INSTRUCTIONS:

- List all nonexempt property from MC 176 P.
- 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).
- Other real property (ORP) must be evaluated to determine if the utilization requirement is met. The \$6,000 exemption for utilized ORP may be spread out over multiple pieces of utilized ORP to maximize eligibility for the multiple mini budget units.
- If excess property is determined for only some of the mini budget units and Medi-Cal is needed for someone in a property-ineligible mini budget unit, the Eligibility Worker (EW) may need to exempt a different vehicle or spread the \$6,000 exemption in a different manner to determine if eligibility can be established for the property-ineligible mini budget unit.
- Motor Vehicle and \$6,000 Utilized Other Real Property Exemptions:
 - The MFBU of a MARRIED couple or SINGLE PARENT is allowed only one of each exemption.
 - **Each** UNMARRIED partner is allowed one of each exemption. His/her exemption may be passed on to a natural/adopted child if the unmarried parent has no such property or wishes to pass the exemption on to his/her child. However, both unmarried parents cannot pass on their exemptions to the same mutual child.
 - A CARETAKER RELATIVE who chooses to be in the same MFBU with the children for whom care is provided is allowed one set of exemptions. In addition, the CHILDREN for whom care is provided are allowed one set of exemptions as a group.

I. ALLOCATION FROM SPOUSE/PARENT

1. For a married couple, enter their total community property in Column II. Enter each spouse's separate property in Column III.
2. 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. CSV of nonexempt life insurance				
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

II. ALLOCATION FROM SPOUSE TO SPOUSE (Skip if MFBU does not contain a married couple.)

16. Enter line 15A in both boxes.	\$	\$
17. Enter line 15B in both boxes.	\$	\$
18. Total (Add lines 16 and 17.) This is each spouse's total share of their net nonexempt property. (Enter this amount on MC 175-4 in the married couple's mini budget unit.)	\$	\$

III. NET NONEXEMPT PROPERTY FOR CHILDREN OR NONPARENT CARETAKER RELATIVE (Do not list unborns.)

Name of Child or Caretaker Relative	1.		2.		3.		4.		5.	
Child's Natural/Adoptive Parent—see Section I (Circle A or B or both.)	A	B	A	B	A	B	A	B	A	B
List only the child's or caretaker relative's property:										
19. Checking	\$		\$		\$		\$		\$	
20. Savings										
21. Nonexempt vehicle										
22. Nonexempt ORP										
23. Other										
24.										
25.										
26. TOTAL										
27. Allocation from Parent A*										
28. Allocation from Parent B*										
29. Net Nonexempt Property (Add lines 26, 27, 28.) Enter on MC 175-4.										

* Enter an allocation from Section I, line 15, only if this is the child's natural/adoptive parent. Leave blank if caretaker relative household.

III. NET NONEXEMPT PROPERTY FOR CHILDREN OR NONPARENT CARETAKER RELATIVE (Continued)

Name of Child or Caretaker Relative	6.		7.		8.		9.		10.	
Child's Natural/Adoptive Parent—see Section I (Circle A or B or both.)	A	B	A	B	A	B	A	B	A	B
List only the child's or caretaker relative's property:										
19. Checking	\$		\$		\$		\$		\$	
20. Savings										
21. Nonexempt vehicle										
22. Nonexempt ORP										
23. Other										
24.										
25.										
26. TOTAL										
27. Allocation from Parent A*										
28. Allocation from Parent B*										
29. Net Nonexempt Property (Add lines 26, 27, 28.) Enter on MC 175-4.										

* Enter an allocation from Section I, line 15, only if this is the child's natural/adoptive parent. Leave blank if caretaker relative household.

NEXT—COMPLETE MC 175-4

Eligibility Worker signature	Worker number	Date of computation
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