

DEPARTMENT OF HEALTH SERVICES

714/744 P STREET
SACRAMENTO, CA 95814

August 11, 1987

TO: All County Welfare Directors
All County Administrative Officers

Letter: 87 - 46

SUBJECT: DRAFT SHARE OF COST BUDGET COMPUTATION FORM

Attached for your review and comment is a rough draft of the subject form. The revision is the result of comments received from the CWDA Medical Care forms subcommittee.

This form is designed to replace existing forms MC 176M, MC 176M-LTC, and MC 176W. As a result of combining the three existing forms into one 2-page form the following items have been removed:

1. The identifying information (name, date of birth, SSN, etc.) for each person in the MFBU.
2. The area for listing exempt income.
3. The part of the MC 176W used to calculate net unearned income in those rare instances in which a deduction is applied against such income.

The following items have been added to the form:

1. A line entry for the cost of IHSS deduction pursuant to 22 CAC Section 50551.6 (Part III, line 4).
2. A separate entry for Medicare premiums and other health insurance premiums (Part IV, line 3 and 4).
3. The deduction of court ordered child/spousal support is placed on the form to be applicable to all Medi-Cal beneficiaries (Part IV, line 5).
4. A line entry for the board and care person's unavailable income pursuant to 22 CAC Section 50515(a)(3) (Part IV, line 7).
5. Therapeutic wages pursuant to 22 CAC Section 50650(a)(2) is listed as a component in the maintenance need for persons in LTC (Part V, line 3b).
6. The community property division of income pursuant to 22 CAC Section 50512(b) is included on the form (Part A).

All County Welfare Directors
All County Administrative Officers
Page 2

Please provide your comments on format and content to us by September 15, 1987. The decision to proceed with this form or update the existing forms will be based upon the input received by this date. Send your comments to:

Ruthell Ussery
DHS, Eligibility Branch
714 P Street, Room 1650
Sacramento, CA 95814

If you have any questions, feel free to contact Ruthell at (916) 322-6238, ATSS 8-492-6238.

Sincerely,

Original signed by

Frank S. Martucci, Chief
Medi-Cal Eligibility Branch

Attachment

cc: Medi-Cal Liaisons
Medi-Cal Program Consultants

Expiration Date: September 30, 1987

E NAME	CASE NUMBER	Effective Date of Budget	Worker Name	Date Completed
		Mo. Yr.		
son				Total = in MFBU
oe				

UNEARNED INCOME

	a. ABD-MN	b. spouse/parent	c. Others
e. Sec			
f. Other Pension			
g. DI			
h. Supp./Alim.			
TOTAL			

ABD-Total 78 & 7b not sp to line 11

g Income Deduct. - 20

Subtotal - lines 8 minus line 9

10a. Unearned - line 7c or lines 7a + 7b + 7c

EARNED INCOME

	a. ABD-MN	b. spouse/parent
1. Gross Earned		
2. Deductions		
3. Subtotal - line 1 minus line 2		
4. Combined earned - line 3a + 3b		
5. Earned inc. deduction + 5 unused \$20		
6. Remainder - line 4 minus line 5		
7. Available earned line 6 by 2		
8. Others	person #1	person #2
9. Gross earned		
10. Work expense dependent care		
11. Subtotal - line 8 minus line 9		
12. 30 deduction, applicable		
13. Subtotal - line 10 minus line 11		
14. Per 1/3 of line 13 if applicable		
15. Subtotal - line 12 minus line 13		
16. Total Earned - lines 14, 15, 1 + 14.C.2		

III TOTAL COUNTABLE INC.

- Total Unearned Part I line 11
- Total Earned Part II line 15
- Combined total line 1 + 2
- IF ABD, Cost of LTS
- Remainder - line 3 minus line 4
- If LTC, enter total Deductions
- If family at home enter alloc. from LTC
- Total Income line 5 + 6

IV ALLOCATION/DEDUCTIONS

- Allocation to excluded children
- LTC/BPC Allocation to family at home
- Medicare Premiums
- Other Health Ins Premiums
- Ch. ordered child/spousal support
- Income Used to Determine PH/Other PH
- B&C Unavailable Inc.
-
- Total Allocations/Deductions - add 1-8

V SOC COMPUTATION

- Total Net Nontaxable Part III, 7 minus II, 9
- Total Rounded
- Maintenance Need
- MFBU members not in LTC #
- MFBU members in LTC
 - Personal Needs
 - Therapeutic Needs
 - Upkeep of home
 - Disabled dependents
- Total Main. Need lines 38 + 3b
- Share of Cost - line 2 minus 3c
- Underpayment Adjustment
- Adjusted SOC line 4 minus 5

A. Allocation to Excluded Childr.

- Maintenance need for MFBU plus excluded children
- Maintenance need for MFBU
- Excluded childrens share line 1 minus line 2
- Net nontaxable income of excluded children
- Allocation to excluded children - line 3 minus 4

Enter amt. in line 5, if any, in Part II line 11

B. Community Prop. Division

- Enter LTC-spouse's total gross community income
- Enter at-home spouse's total gross community income

earned + unearned

If line 2 is greater than line 1, + at-home spouse's community int is protected. Enter all income received by LTC spouse in Part I and Part II. Enter all income rec by at-home spouse on a separate mc 176 M

If line 2 is less than line 1, Complete lines 3 and 4 below.

- Total community income - line 1 + 2
- Each spouse's share ÷ line 3 by 2

Enter the amount in line 4 on Part I, line 5 for the LTC spouse as "community income."

If the at-home spouse has no earned income, enter the amount in line 4 on a separate mc 176 Part I, line 5 as "community inc"

If the at-home spouse has earned income, enter the gross earnings on a separate mc 176 M, Part II. Enter the difference between the gross earnings and the amount in line 4 on Part I, line 5 as "community income"

If at-home spouse is not a PH recipient complete Part D

ESTABLISHMENT OF THE STEPPARENT UNIT

Maintenance for: stepparent parent stepparent's children # _____ Mutual children # _____	\$	
stepparent's gross earned income	\$	
Mandatory deductions (actual)	\$	
Net earned income (line 2 minus line 3)	\$	
stepparent's gross unearned income	\$	
stepparent's total income (line 4 plus line 5)	\$	
Court ordered child support	\$	
stepparent's net income (line 6 minus line 7)	\$	
Is greater than line 8? If NO, complete Part II <input type="checkbox"/> Yes <input type="checkbox"/> No		

C. II STEPPARENT COMPUTATION

1. Stepparent's gross earned income	\$
2. Work expenses	\$ 75
3. Net earned income (line 1 minus line 2)	\$
4. Stepparent's gross unearned income	\$
5. Stepparent's total income (line 3 plus line 4)	\$
6. Contributions to tax dependents	\$
7. Child support/alimony	\$
8. Stepparent's deductions (line 6 plus line 7)	\$
9. Stepparent's total net income (line 5 minus line 8)	\$
10. Maintenance need for stepparent unit: Stepparent Stepparent's children # _____ Mutual children # _____	\$
11. Stepparent's income deemed available (line 9 minus line 10). If less than 0, enter 0	\$

Enter amount in line 11 on Reverse, Part I, 506 as "from stepparent."

LOCATION FROM LTC OR BOARD AND CARE PERSON TO USE AND/OR CHILDREN AT HOME

Maintenance need for spouse and/or children at home other than excluded children	\$
Net countable income of spouse and/or nonexcluded children	\$
Net allocations/deductions of spouse and/or nonexcluded children	\$
Net net nonexempt income of spouse and/or excluded children (line 2 minus line 3)	\$
Net needs of spouse and/or nonexcluded children (line 1 minus line 5)	\$
Net countable income of person in LTC or board and care	\$
Health insurance for person in LTC or board and care	\$
Net net nonexempt income of person in LTC or board and care (line 6 minus line 7)	\$
Maintenance need for person in LTC or board and care	\$
Net amount needed for maintenance (lines 9 and 10)	\$
Net amount available for allocation to spouse and/or children (line 8 minus line 11)	\$
Allocation to spouse and/or children (line 5 or line 12, whichever is less)	\$

Share of cost determination of the ABD person or the spouse of the ABD person, enter above amount on Reverse, Part III, line 63.
Share of cost determination of spouse and/or children at home, enter above amount on Reverse, Part III, line 66.

E. SSI/SSP OR IHSS RECIPIENT(S) IN FAMILY—INCOME AVAILABLE/ALLOCATED

1. SSI/SSP appropriate payment level (plus IHSS authorization for IHSS only)	\$
2. Actual SSI/SSP payment (or IHSS payment)	\$
3. Net nonexempt income used to determine grant (or IHSS) (line 1 minus line 2)	\$
4. Gross unearned income of SSI/SSP or IHSS recipient (other than grant or IHSS payment)	\$
5. SSI/SSP unearned income deductions and exemptions	\$
6. Net nonexempt unearned income (line 4 minus line 5)	\$
7. Gross earned income of SSI/SSP or IHSS recipient	\$
8. SSI/SSP earned income deductions and exemptions	\$
9. Net nonexempt earned income (line 7 minus line 8)	\$
10. Total net nonexempt income (add lines 6 and 9)	\$
11. If line 10 is greater than line 3, the difference is income available to the MFBU and is entered here and on Reverse, Part I, line 506, as "income available from PA"	\$
12. If line 10 is less than line 3, the difference is the allocation to the SSI/SSP or IHSS recipient and is entered here on Reverse, Part IV, line 61 and	\$