TO: All County Welfare Directors  
   All County Administrative Officers  
   All County Medi-Cal Program Specialists/Liaisons  
   All County Pickle Coordinators

Letter No.: 94-96

REVISIONS TO PICKLE FORMS DHS 7019, DHS 7021 AND DHS 7029

The purpose of this letter is to advise the counties that Pickle forms DHS 7019, DHS 7021 and DHS 7029 have been revised. Camera ready copies are enclosed. The forms will be available from the Department of Health Services Warehouse, 1037 North Market Boulevard, Suite 9, Sacramento, California 95834 on December 9, 1994. Please use form DHS 2031 to order these forms from the warehouse.

The form revisions were as follows:

1. DHS 7019 - Asterisk near "Allocation (1/2 Federal Benefit Rate [FBR] for an individual)" was removed.
2. DHS 7021 - Added to Part E, 1, "(If VTR, enter zero and use household of another in F.1)".
3. DHS 7020 - Added "Was eligible for and received ..." on line 2, A and B. The instructions on the back side of document were also revised.

These revised forms will be added to Pickle Letter No. 12 in January 1995. If you have any questions, please contact Sylvia Finberg of my staff at (916) 657-0080.

Sincerely,

ORIGINAL SIGNED BY -

Frank S. Martucci, Chief  
Medi-Cal Eligibility Branch

Enclosures
PICKLE ELIGIBLES
FINANCIAL ELIGIBILITY WORK SHEET—ELIGIBLE CHILD WITH INELIGIBLE PARENT OR PARENTS

CASE NAME

APPLICANT'S NAME

CASE NUMBER

PART I. INELIGIBLE PARENT'S UNEARNED INCOME

1. Parent's unearned income—do not include public assistance income: $_______

   Do not include Pickle-eligible children.
   
   a. Allocation (1/2 Federal Benefit Rate[FBR] for an individual): _______ + _______ + _______ + _______ = $ _______
   
   b. Minus child's income: _______ + _______ + _______ + _______ = $ _______
   
   c. Total allocation: ____ + ____ + ____ + ____ = $ _______

3. Remaining unearned income (subtract line I.2.c. from line I.1.): $_______

PART II. INELIGIBLE PARENT'S EARNED INCOME

1. Parent's gross earned income: $_______

2. Unused portion of allocation for ineligible child(ren): $_______

3. Remaining earned income (subtract II.2. from II.1.): $_______

IF THERE IS NO INCOME REMAINING AND I.3 AND II.3 ARE BOTH ZERO, DO NOT DEEM, GO TO PART IV.
IF THERE IS INCOME, PROCEED WITH PART III.

PART III. COMBINED INCOMES—Parent's Allocation

<table>
<thead>
<tr>
<th>Unearned Income</th>
<th>Earned Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Remaining unearned income (after allocation) or zero (from I.3.)</td>
<td>1. Remaining earned income (after allocation) or zero (from II.3.)</td>
</tr>
<tr>
<td>2. Subtract general income exclusion</td>
<td>2. Subtract general income exclusion</td>
</tr>
<tr>
<td>3. Countable unearned income (to III.11.)</td>
<td>3. Countable earned income (to II.12.)</td>
</tr>
<tr>
<td>4. Remaining earned income (from II.3.)</td>
<td>4. Remaining earned income (from II.3.)</td>
</tr>
<tr>
<td>5. Subtract balance of general income exclusion</td>
<td>5. Subtract balance of general income exclusion</td>
</tr>
<tr>
<td>6. Remainder</td>
<td>6. Remainder</td>
</tr>
<tr>
<td>7. Subtract work expense exclusion</td>
<td>7. Subtract work expense exclusion</td>
</tr>
<tr>
<td>8. Remainder</td>
<td>8. Remainder</td>
</tr>
<tr>
<td>9. Subtract 1/2 remainder</td>
<td>9. Subtract 1/2 remainder</td>
</tr>
<tr>
<td>10. Countable earned income (to II.12.)</td>
<td>10. Countable earned income (to II.12.)</td>
</tr>
</tbody>
</table>

Deemed Income

<table>
<thead>
<tr>
<th>Countable unearned income (from III.3.)</th>
<th>Add countable earned income (from III.10.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Countable unearned income (from III.3.)</td>
<td>Total countable income (from III.11. + III.12.)</td>
</tr>
<tr>
<td>12. Add countable earned income (from III.10.)</td>
<td>13. Subtotal countable income</td>
</tr>
<tr>
<td>15. Deemed income</td>
<td>15. Deemed income</td>
</tr>
</tbody>
</table>

* Individual FBR if one ineligible parent lives with child, couple FBR if both ineligible parents live with child.

PART IV. PICKLE ELIGIBILITY CALCULATION

1. Deemed income from Part III.15.

2. Add eligible child's own OASDI income

3. Subtract Title II COLAs

4. Total countable OASDI

5. Other unearned income

6. Subtract general income exclusion

7. Countable unearned income (IV.1 + IV.4 + IV.5 - $20)

8. Child's countable earned income (subtract $65 + 1/2 remainder)

9. Total countable income

10. Current SSI/SSP payment level

If line IV.9 is less than line IV.10, this person is eligible as an aid code 16, 26, or 66.
FINANCIAL ELIGIBILITY WORK SHEET I
(Individual or Couple, Applicant With an Ineligible Spouse)

CASE NAME ________ CASE NUMBER ________

APPLICANT'S NAME _______________________

PART A. NEEDS TEST

1. Applicant's total earned and unearned income (MC 176M, Part I, Line 14): $ ______
   Title II COLA disregard amount: $ ______
   Total countable income (subtract A.2 from A.1): $ ______
   (If single applicant or couple pass the screening work sheet, proceed to Part F.): $ ______

PART B. INELIGIBLE SPOUSE'S UNEARNED INCOME

1. Ineligible spouse's total unearned income—do not include public assistance income: $ ______
   Title II COLA disregard amount: $ ______
   Countable unearned income (subtract B.2 from B.1): $ ______
   Allocation for ineligible children. (If no children, enter zero in B.4.c.)
   Do not include Pickle-eligible children.
   a. Allocation (couple Federal Benefit Rate [FBR] minus individual FBR): Table
   b. Subtract child's income: ____________________ + ____________________ + ____________________ + ____________________ = $ ______
   c. Total allocation: ____________________ + ____________________ + ____________________ + ____________________ = $ ______
   5. Remaining unearned income (subtract line B.4.c. from B.3): $ ______

PART C. INELIGIBLE SPOUSE'S EARNED INCOME

1. Ineligible spouse's gross earned income: $ ______
   Unused portion of allocation for ineligible child(ren): $ ______
   Remaining earned income (subtract C.2 from C.1): $ ______

PART D. INELIGIBLE SPOUSE'S TOTAL INCOME AFTER ALLOCATIONS (Add B.5 and C.3) (If less than the difference between the FBR for a couple and the FBR for an individual, deeming not applicable. Make no entry for ineligible spouse's income in Part E): $ ______

PART E. COMBINED INCOMES (Eligible individual or couple and/or ineligible spouse after ineligible child allocations)

1. Applicant's gross unearned income (including any applicable ISM-DHS 7044). (If VTR, enter zero and use household of another in F.1): $ ______
   Applicant's Title II COLA disregard amount: $ ______
   Applicant's countable unearned income (subtract line E.2 from line E.1): $ ______
   Ineligible spouse's unearned income (line B.5): $ ______
   Combined unearned income (add lines E.3 and E.4): $ ______
   Subtract general income exclusion: $ ______
   Combined countable unearned income: $ ______
   Earned income of applicant and spouse (use amount from line C.3 for ineligible spouse): $ ______
   Subtract balance of general exclusion not offset by unearned income (line E.6): $ ______
   Remaining earned income: $ ______
   Subtract work expense exclusion: $ ______
   Remaining earned income: $ ______
   Subtract 1/2 remaining earned income: $ ______
   Countable earned income: $ ______
   Total countable income (add lines E.7 and E.14): $ ______

PART F. PICKLE ELIGIBILITY CALCULATION

1. Current SSI/SSP payment level for an individual or a couple: $ ______
2. Enter total countable income (line A.3 or E.15): $ ______

If line F.2 is less than or equal to F.1, the applicant is Pickle eligible. If ineligible, enter in Tickler System.

ELIGIBILITY WORKER SIGNATURE _______________________
WORKER NUMBER ________ COMPUTATION DATE ________ COUNTY USE ________

DHS 7021 (10/94)
### DISREGARD COMPUTATION WORKSHEET

(PICKLE ELIGIBLE INDIVIDUAL OR COUPLE AND/OR INELIGIBLE SPOUSE WITH RSDI* INCOME)

<table>
<thead>
<tr>
<th>A. POTENTIAL PICKLE PERSON'S NAME</th>
<th>DISREGARD AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>(This person/spouse passed screening.)</td>
<td></td>
</tr>
<tr>
<td>1. Current RSDI Benefit Amount $ ____</td>
<td></td>
</tr>
<tr>
<td>2. Was eligible for and received last SSI/SSP check on ________ X (Date) (Multiplier)</td>
<td>(Round to Nearest $) $ ____</td>
</tr>
<tr>
<td>3. Total Amount $ ____</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>B. POTENTIAL PICKLE PERSON'S NAME</th>
<th>DISREGARD AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>(This spouse also passed screening.)</td>
<td></td>
</tr>
<tr>
<td>(Use if BOTH spouses pass the Screening Test.)</td>
<td></td>
</tr>
<tr>
<td>1. Current RSDI Benefit Amount $ ____</td>
<td></td>
</tr>
<tr>
<td>2. Was eligible for and received last SSI/SSP check on ________ X (Date) (Multiplier)</td>
<td>(Round to Nearest $) $ ____</td>
</tr>
<tr>
<td>3. Total Amount $ ____</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>C. INELIGIBLE SPOUSE OF POTENTIAL PICKLE PERSON</th>
<th>DISREGARD AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>(This spouse did not pass screening.)</td>
<td></td>
</tr>
<tr>
<td>(Use if one spouse has passed the Screening Test and one has not, but both have RSDI income.)</td>
<td></td>
</tr>
<tr>
<td>1. Current RSDI Benefit Amount $ ____</td>
<td></td>
</tr>
<tr>
<td>2. Date potential Pickle person's SSI/SSP was discontinued</td>
<td></td>
</tr>
<tr>
<td>OR</td>
<td></td>
</tr>
<tr>
<td>Date when ineligible spouse started receiving RSDI (WHICHEVER IS LATER)</td>
<td>(Round to Nearest $) $ ____</td>
</tr>
<tr>
<td>_______________ X (Date) (Multiplier)</td>
<td></td>
</tr>
<tr>
<td>3. Total Amount $ ____</td>
<td></td>
</tr>
</tbody>
</table>

*RSDI: Retirement, Survivors and Disability Insurance under Social Security

DHS 7029 (11/94)
INSTRUCTIONS FOR DISREGARD COMPUTATION WORKSHEET
(DHS 7029)

The PICKLE DISREGARD COMPUTATION WORKSHEET (DHS 7029) must be completed and filed with the Screening worksheet (DHS 7020) in each case with potential Pickle eligibility.

TO COMPLETE THE DHS 7029:

1. Determine the section to be used for each person (A, B, or C).

   Situation:
   a) Disabled child and parent(s):
      - Use Section A for the child.
      - The parents are not in any section because there is no disregard for the parents’ RSDI COLAs.
   b) ABD couple and both are potential Pickle, i.e. both passed screening:
      - Use Section A for one spouse with potential Pickle eligibility.
      - Use Section B for the other spouse with potential Pickle eligibility.
   c) ABD spouse who passed screening and has potential Pickle eligibility; he/she has spouse who did not pass screening. Both spouses have RSDI:
      - Use Section A for the spouse who passed screening.
      - Use Section C for the ineligible spouse who did not pass screening.

2. Determine the current RSDI benefit amount and enter on line 1 for each person.

3. If Part A or Part A and Part B are being used: Determine the date when the individual was last eligible for and received SSI/SSP check, enter the month and the year on line 2.

   If Part C is being used: Either determine the date the potential Pickle person’s SSI was discontinued or the date when the ineligible spouse started receiving RSDI, whichever is later.

   To determine the multiplier, refer to the DHS’ current year All County Welfare Directors letter titled “January (appropriate year) Social Security Title II and Title XVI Cost of Living Adjustments (COLA) and Related Issues.” Enter the multiplier also on line 2.

4. Multiply line 1 by line 2 and enter the amount on line 3.

   (Round to nearest dollar and enter under “Disregard Amount.”)

   EXAMPLE: Current RSDI benefit amount is $655. Applicant last received SSI/SSP in 12/90. Multiply $655 by 0.1342. Result is $87.90. Rounded to nearest dollar, the disregard amount is $88. The multiplier will change each year with the RSDI COLA.