



DEPARTMENT OF HEALTH SERVICES

14/744 P STREET
SACRAMENTO, CA 95814

July 15, 1985

To: All County Welfare Directors
County Administrative Officers

Letter No. 85- 53

REESE V. KIZER (COMMUNITY PROPERTY DIVISION OF INCOME WHEN
ONE SPOUSE IS IN LTC)

This is to provide you with instructions for immediate implementation of a stipulated agreement pending appeal of the subject litigation.

Background:

In 1983 legislation (AB 1667, copy attached) was enacted which required recognition of the community property division of income when one spouse is in LTC and the other spouse resides at home, if federally permissible. The law was not implemented because the Department of Health and Human Services (DHHS) had indicated that such a division conflicts with federal law.

Reese v. Kizer (Alameda Superior Court) was initiated because AB 1667 has not been implemented. On April 29, 1985 a preliminary injunction was issued ordering the Department to implement a portion of the law. The Department filed an appeal which automatically stayed the injunction. Pending the appeal decision, we have entered into a stipulated agreement with the Plaintiffs to determine the shares of cost in accordance with subdivision (a) of AB 1667, in those instances where the applicant, beneficiary or person acting on behalf of an applicant/beneficiary requests such an action.

Instructions

Advise your staff to take the following actions immediately upon request by an LTC applicant, beneficiary or person acting on behalf of an LTC applicant/beneficiary. A request shall be a written or verbal reference to any of the following:

1. Reese v. Kizer
2. AB 1667
3. Section 14005.16, Welfare and Institutions Code, or words to that effect.
4. Community property division of income, or words to that effect.

Counties are under no obligation to advise applicants or beneficiaries that these instructions may apply in their case. Eligibility staff should apply these instructions only upon request; in all other instances existing regulations should be applied. Eligibility staff should explain to the persons requesting consideration of the division of community income that such consideration may only be temporary pending resolution of the litigation.

A. Affected Population

The only persons affected by the agreement are persons in long-term care who:

1. Have spouses residing at home; and
2. Are in their own MFBUs in accordance with existing regulations (22, CAC, Section 50377).

B. Determination of Community Property Ownership

All unearned income received by the LTC spouse and all income (earned and unearned) received by the at-home spouse should be presumed community property income unless this presumption is rebutted by one of the spouses.

C. Determination of the Amount of Community Property Unearned Income of the LTC Spouse Protected for the Spouse Living at Home

1. Identify the community property unearned income received by the LTC spouse.
2. Identify the community property income (earned and unearned) of the at-home spouse.
3. Combine the amounts determined in steps 1 and 2 and divide this sum by 2.
4. Compare the amount determined in step 3 to the amount of the total community property income received by the at-home spouse (step 2). If the at-home spouse's income (step 2) is equal to or greater than the amount determined in step 3, the at-home spouse's community property interest is adequately protected and no further action need be taken to implement AB 1667. However, if the income received by the at home spouse is less than the amount determined in step 3, the

All County Welfare Directors -3-
County Administrative Officers

difference must be treated as income of the at-home spouse and is not to be considered when determining the long-term care spouse's share of cost.

A worksheet is attached for use in calculating the community property income protection. Also included are examples of share-of-cost calculations. Please note that the allocation provisions of Title 22, CAC, Section 50563 are applied after calculating the community property income protection.

If you have any questions please contact Ruthell Ussery of my staff at (916) 324-4970.

Sincerely,

Original signed by

Doris Z. Soderberg, Chief
Medi-Cal Eligibility Branch

cc: Medi-Cal Consultants
Medi-Cal Program Consultants

Expiration Date: July 15, 1986

Assembly Bill No. 1667

CHAPTER 1031

An act to add Section 14005.16 to the Welfare and Institutions Code, relating to Medi-Cal.

[Approved by Governor September 21, 1983. Filed with Secretary of State September 22, 1983.]

LEGISLATIVE COUNSEL'S DIGEST

AB 1667, Connolly. Medically needy persons.

Existing law provides that one of the services covered under the Medi-Cal program is care received in skilled nursing or intermediate care facilities.

Existing law provides for the medically needy category of eligibility under the Medi-Cal program, under which persons who would qualify for specified public assistance programs but for their income or resources are still eligible for Medi-Cal if they have insufficient income to pay for the cost of health care. Under this category, however, individuals may be required to pay a share of costs in order to fulfill eligibility requirements.

This bill would provide that the community property interest of a noninstitutionalized spouse in the unearned income of the other spouse shall not be considered as available income to the spouse living in a skilled nursing facility or intermediate care facility for purposes of determining Medi-Cal eligibility if the spouses are not in the same Medi-Cal budget unit.

The bill would further specify that the community property interest of the institutionalized spouse in the unearned income of the noninstitutionalized spouse would be deemed as available income to the institutionalized spouse.

The bill would further provide that any federal waivers necessary in order to implement provisions of this act shall be sought by the State Department of Health Services, but that failure to obtain any necessary waivers shall not affect implementation of any provisions for which waivers are not necessary or for which waivers are obtained.

The bill further provides that the provisions of the act shall be implemented pursuant to adoption of emergency regulations.

The people of the State of California do enact as follows:

SECTION 1. Section 14005.16 is added to the Welfare and Institutions Code, to read:

14005.16. (a) In determining the eligibility of a married individual, pursuant to Section 14005.4 or 14005.7, who resides in a skilled nursing facility or an intermediate care facility, and who is in

a Medi-Cal family budget unit separate from that of his or her spouse, the community property interest of the noninstitutionalized spouse in the unearned income of the married individual shall not be considered income available to that individual.

(b) In determining the eligibility of a married individual pursuant to Section 14005.4 or 14005.7 who resides in a skilled nursing facility or an intermediate care facility, and who is in a Medi-Cal family budget unit that does not include his or her spouse, the community property interest of the institutionalized individual in the unearned income of the noninstitutionalized spouse shall be considered income available to that individual.

SEC. 2. (a) Any provision of this act that is in conflict with any federal statute or regulation shall be inapplicable to the extent of such conflict, but the provision and the remainder of the provisions shall be unaffected to the extent no conflict exists.

(b) The State Department of Health Services shall, within 30 days of the operative date of this act, seek all federal waivers necessary to implement the provisions. The provisions for which appropriate federal waivers cannot be obtained shall not be implemented, but provisions for which waivers are either obtained or found to be unnecessary shall be unaffected by the inability to obtain federal waivers for the other provisions.

(c) The State Director of Health Services shall, within 30 days of obtaining all necessary federal waivers, adopt regulations implementing the provisions as emergency regulations in accordance with the provisions of Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code. For the purposes of Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code, the adoption of the regulations shall be deemed to be an emergency and necessary for the immediate preservation of the public peace, health and safety, or general welfare. Notwithstanding the provisions of Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code, emergency regulations adopted by the State Department of Health Services in order to implement the provisions shall not be subject to the review and approval of the Office of Administrative Law. These regulations shall become effective immediately upon filing with the Secretary of State.

(d) If any provision of this act or the application thereof to any person or circumstances is held invalid, such invalidity shall not affect other provisions or applications of the act that can be given effect without the invalid provision or application, and to this end the provisions of this act are severable.

Attachment

1. Community Property
Unearned Income
LTC Spouse

2. Community Property
Income At Home Spouse
\$ + \$ =
 earned unearned

3. Total (Add lines 1 & 2)

4. Each Spouse's
Community Interest
(line 3 - 2)

A. If line 2 is equal to or greater than line 4, the at-home spouse's community property interest is adequately protected.

A1. Use the amount in line 2 plus any separate income of at-home spouse when determining SOC of at-home spouse and allocation from LTC spouse pursuant to 22 CAC Section 50563.

A2. Use the amount in line 1 plus any earnings and separate income of LTC spouse when determining LTC SOC.

B. If line 2 is less than line 4 the at-home spouse's community property interest is not adequately protected.

B1. Use the amount in line 4* plus any separate income of at-home spouse when determining SOC of at-home spouse and allocation from LTC spouse pursuant to 22 CAC Section 50563.

B2. Use the amount in line 4 plus any earnings and separate income of LTC spouse when determining LTC SOC.

* If the at-home spouse has earnings, the earned and unearned portions of line 4 must be identified to enable the proper income deductions to be applied. (See example 2).

Example 1:

\$800 unearned income is received in the name of the LTC spouse*

\$-0- is received in the name of the at-home spouse who is not linked to a Medi-Cal program.

1. Community Property Unearned Income of LTC

Spouse		\$800
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2. Community Property Income of at-home

Spouse	\$ <u>-0-</u>	+	\$ <u>-0-</u>	\$-0-
	Earned		Unearned	

3. Total	\$800
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4. Each spouse's interest	\$400
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* entered LTC last month

Example 1

County District County Use

Application ☐ Redetermination ☐ Change ☐ Retroactive Elig. ☐ Correction

Effective Eligibility Date for this Budget

Mo. Yr.

State Number		Name - First, Middle, Last		Birthdate	Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Cover
a. 7 Digit Serial No.	b. MFSU No.			Mo. Day Yr.			
		LTC Spouse				(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	

ome of MFBU members applying as aged, id, or disabled plus income of spouse or emt (except PA or other PA)

II. Income of MFBU members not listed in I. (except PA or other PA)

III. Share of cost computation

NEXEMPT UNEARNED INCOME			A. NONEXEMPT UNEARNED INCOME		1. Countable income from I, 18	
	2. ABD-MN	d. Spouse or Parent	1. Social Security		2. Countable income from II, 11	380
ocial Security			2. Net Income from Property		3. Total countable eligibility income (add 1 and 2)	380
Income from Property			3. Other—itemize		DEDUCTIONS ADDED BACK FOR LTC SOC	
Itemize			4.		4. ABD income deductions (e.g., any income deduction)	+ \$20
4. 1 through 4)	400				5. Other income deductions	
Deductions			5. Total unearned income (add 1 through 4)		6. Total deductions added back (add 4 and 5)	20
mainder (minus 6)	a.	b.	6. Deductions		7. Total countable income (add 3 and 6)	400
combined unearned inc. (6 7a and 7b)	400		7. Countable unearned inc. (5 minus 6)		ALLOCATIONS AND DEDUCTIONS	
ly income deduction	—\$20		B. NONEXEMPT EARNED INCOME		8. Allocation from LTC/S&C Income (126W, Part III)	100
ountable unearned inc. (8 minus 9)	380		8. Net earned Income (MTC 126W, Part IV, Line 11)		9. Allocation to excluded children (126W, Part I)	
NEXEMPT EARNED INCOME			9. Subtotal countable income (add 7 and 8)		10. Income to determine PA Eligibility	
oss Earned Income	a. 0	b.	10. Child Support/Alimony paid.		11. Health Insurance	
Deductions			11. Total countable income (9 minus 10)		12. Total allocations/deductions (add 8 through 11)	100
mainder (minus 12)	2.	b.			13. Total net nonexempt income (7 minus 12)	291
combined earned inc. (12 13a and 13b)					14. Total net nonexempt income rounded	291
earned inc. deduction (13 14 unused \$20)					15. Maintenance need	
mainder (minus 15)					2. MFBU members not in LTC No.	
ountable earned inc. (15 16 by 2)					b. MFBU members in LTC	
al countable inc. (16 17)	380				• Personal needs	
EMPT INCOME					• Upkeep of home	
					• Needs of disabled dependents	
					c. Total maintenance need (15a + 15b)	35
					16. Share of cost (14 minus 15)	256
					17. Underpayment adjustment	
					18. Adjusted Share of Cost (17 minus 18)	256

by Worker Signature/Computation Date Worker Number County Use

Application ☐ Redetermination ☐ Change ☐ Retroactive Elig. ☐ Correction

Effective Eligibility Date for this Budget

Mo.

Yr.

State Number			Name - First, Middle, Last	Birthdate Mo. Day Yr.	Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Coverage
7 Digit Serial No.	MFBU No.	Pers. No.					
			ineligible at-home spouse			(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	

me of MFBU members applying as aged, blind, disabled plus income of spouse or parent except PA or other PA)

II. Income of MFBU members not listed in I. (except PA or other PA)

III. Share of cost computation

EXEMPT UNEARNED INCOME

	a. ABD-MN	b. Spouse or Parent
DI		
Income		
Property		
Itemize		
1 thru 4)		

Combined unearned income (a and 5b)	
Income deduction	-\$20
Countable unearned Income (a plus 7)	

EXEMPT EARNED INCOME

Earned	a.	b.
Combined earned Income (9a and 9b)		
earned Inc. deduction \$ unused S20		
Under (10 minus 11)		
Countable earned Income (12 by 2)		
Countable Income (3 and 13)		

If the following deductions apply, complete Part VI before completing Column I:

Additional Expenses	Section 50547
Parent Support	Section 50541
nt Deduction	Section 50551
plus 1/3	Section 50551.1
Expenses for the Blind	Section 50551.4
ie for Self-Support	Section 50551.5

A. NONEXEMPT UNEARNED INCOME

1. OASDI	
2. Net Income from Property	
3. Other-Itemize	
4. Total unearned Income (add 1 thru 4)	400

B. NONEXEMPT EARNED INCOME

6. Total Net Earned Income (MC 176W, Part IV, Line 11.)	
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C. TOTAL COUNTABLE INCOME

7. Subtotal (add 5 and 6)	
8. Child Support/Alimony Paid	
9. Total Countable Income (7 minus 8)	400

NOTE:

If there is income from which Educational Expenses are deducted (Section 50547), show calculations here. Enter net amount on line 3 or 4.

Total income for educational purpose	
Less total educational expenses	
Net countable income	

1. Countable Income from I 14

2. Countable Income from II 9	400
3. Income allocated from LTC/B&C person to family members at home (176W, Part III)	
4. Combined Countable Income (add 1, 2, and 3)	

ALLOCATIONS AND DEDUCTIONS

5. Allocation to excluded children (176W, Part I)	
6. Income to determine PA Eligibility	
7. Health Insurance	
8.	
9.	
10. Total allocations/deductions (add 5 through 9)	
11. Total net nonexempt Income (4 minus 10)	
12. Total net nonexempt Income rounded	
13. Maintenance need	
a. MFBU members not in LTC No.	
b. MFBU members in LTC <ul style="list-style-type: none">• Personal needs• Upkeep of home• Needs of disabled dependents	
c. Total maintenance need (13a + 13b)	
14. Share of cost (12 minus 13c)	
15. Underpayment adjustment	
16. Adjusted Share of Cost (14 minus 15)	

Worker Signature

Worker Number

Computation Date

County Use

Name: Example 1

CHILDREN WITH SEPARATE INCOME OR PROPERTY EXCLUDED FROM THE MFBU NO. _____

Maintenance need for MFBU plus excluded child(ren)	\$
Maintenance need for MFBU	\$
Excluded child(ren)'s share of maintenance need (line 1 minus line 2)	\$
Net nonexempt income of excluded child(ren)	\$
Allocation to excluded child(ren) (line 3 minus line 4)	\$
Enter above amount on MC 176 M, column III, line 5	

County Use	Date This Form Effective
Case Number	Number in MFBU

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

SSI/SSP appropriate payment level (plus IHSS authorization for IHSS only)	\$	
Actual SSI/SSP payment (or IHSS payment)	\$	
Net nonexempt income used to determine grant (or IHSS) (line 1 minus line 2)	\$	
Gross unearned income of SSI/SSP or IHSS recipient (other than grant or IHSS payment)	\$	
SSI/SSP unearned income deductions and exemptions	\$	
Net nonexempt unearned income (line 4 minus line 5)	\$	
Gross earned income of SSI/SSP or IHSS recipient	\$	
SSI/SSP earned income deductions and exemptions	\$	
Net nonexempt earned income (line 7 minus line 8)	\$	
Total net nonexempt income (lines 6 and 9)	\$	
If line 10 is greater than line 3, the difference is income available to the MFBU and is entered here on MC 176 M, column I or II, line 3, as "Parent income available"		
If line 10 is less than line 3, the difference is the allocation to the SSI/SSP or IHSS recipient and entered here and on MC 176 M, column III, line 6.		

III. ALLOCATION FROM LTC OR BOARD AND CARE PERSON TO SPOUSE AND/OR CHILDREN AT HOME

1. Maintenance need for spouse and/or children at home (other than excluded children)	\$	509
2. Total countable income of spouse and/or nonexcluded children	\$	400
3. Total allocations/deductions of spouse and/or nonexcluded children	\$	0
4. Total net nonexempt income of spouse and/or nonexcluded children (line 2 minus line 3)	\$	400
5. Unmet needs of spouse and/or nonexcluded children (line 1 minus line 5)	\$	109
6. Total countable income of person in LTC or board and care	\$	400
7. Health insurance for person in LTC or board and care	\$	0
8. Total net nonexempt income of person in LTC or board and care (line 6 minus line 7)	\$	400
9.	\$	
10. Maintenance need for person in LTC or board and care	\$	35
11. Total amount needed for maintenance (add lines 9 and 10)	\$	35
12. Amount available for allocation to spouse and/or children (line 8 minus line 11)	\$	365
13. Allocation to spouse and/or children (line 5 or line 12, whichever is less)	\$	109
A For share of cost determination of the ABD person or the spouse of the ABD person, enter above amount on MC 176 M, Column III, line 3		
B For share of cost determination of spouse and/or children at home, enter above amount on MC 176 M, column II, line 4		

By Worker Signature	Worker Number	Date of Computation
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EXAMPLE 2

Application ☐ Redetermination ☐ Change ☐ Retroactive Elig. ☐ Correction

County District _____ County Use _____
Effective Eligibility Date for this Budget
Mo. _____ Yr. _____

State Number	Birthdate	Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Cover
7 Digit Serial No. MFBU No.	Mo. Day Yr.			
			(1) _____ (2) _____	
			(1) _____ (2) _____	
			(1) _____ (2) _____	
			(1) _____ (2) _____	
			(1) _____ (2) _____	
			(1) _____ (2) _____	
			(1) _____ (2) _____	

I. Income of MFBU members applying as aged, blind, or disabled plus income of spouse or other (except PA or other PA)
II. Income of MFBU members not listed in I. (except PA or other PA)
III. Share of cost computation

NONEXEMPT UNEARNED INCOME		A. NONEXEMPT UNEARNED INCOME		1. Countable income from I, 1B		530
1. Social Security		2. Countable income from II, 11				0
2. Net income from Property		3. Total countable eligibility income (add 1 and 2)				530
3. Other—itemize		DEDUCTIONS ADDED BACK FOR LTC SOC				
4.		4. ASD income deductions (e.g., any income deduction)				+520
5. Total unearned income (add 1 through 4)		5. Other income deductions				
6. Deductions		6. Total deductions added back (add 4 and 5)				20
7. Countable unearned inc. (5 minus 6)		7. Total countable income (add 3 and 6)				550
B. NONEXEMPT EARNED INCOME		ALLOCATIONS AND DEDUCTIONS				
8. Net earned income (MC 176W, Part IV, Line 11)		8. Allocation from LTC/B&C Income (176W, Part III)				34
9. Subtotal countable income (add 7 and 8)		9. Allocation to excluded children (176W, Part I)				
10. Child Support/Alimony paid		10. Income to determine PA Eligibility				
11. Total countable income (9 minus 10)		11. Health Insurance				
		12. Total allocations/deductions (add 8 through 11)				34
		13. Total net nonexempt income (7 minus 12)				516
		14. Total net nonexempt income rounded				
		15. Maintenance need				
		a. MFBU members not in LTC No.				
		b. MFBU members in LTC • Personal needs • Upkeep of home • Needs of disabled dependents				
		c. Total maintenance need (15a + 15b)				35
		16. Share of cost (14 minus 15)				481
		17. Underpayment adjustment				

Worker Signature/Computation Date _____

Worker Number _____

County Use _____

Application ☐ Redetermination ☐ Change ☐ Retroactive Elig. ☐ Correction

Effective Eligibility Date for this Budget

Mo. Yr.

State Number	Birthdate	Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Coverage
7 Digit Serial No. MFBU Pers. No.	Name - First, Middle, Last	Mo. Day Yr.		
	at-home spouse		(1) (2)	
	ineligible		(1) (2)	
			(1) (2)	
			(1) (2)	
			(1) (2)	
			(1) (2)	
			(1) (2)	
			(1) (2)	
			(1) (2)	

I. Income of MFBU members applying as aged, blind, disabled plus income of spouse or parent (except PA or other PA)		II. Income of MFBU members not listed in I. (except PA or other PA)		III. Share of cost computation	
I. EXEMPT UNEARNED INCOME		A. NONEXEMPT UNEARNED INCOME		1. Countable Income from I 14	
DI	a. ABD-MN b. Spouse or Parent	1. OASDI		2. Countable Income from II 9	475
Income Property		2. Net Income from Property		3. Income allocated from LTC/B&C person to family members at home (176W, Part III)	
r-Itemize		3. Other-Itemize		4. Combined Countable Income (add 1, 2, and 3)	
		4. Community Share 150		ALLOCATIONS AND DEDUCTIONS	
1 thru 4)		5. Total unearned Income (add 1 thru 4)		5. Allocation to excluded children (176W, Part I)	
Unearned income (5a and 5b)		B. NONEXEMPT EARNED INCOME		6. Income to determine PA Eligibility	
Income deduction -S20		6. Total Net Earned Income (MC 176W, Part IV, Line 11.)	325	7. Health Insurance	
Countable unearned Income (minus 7)		C. TOTAL COUNTABLE INCOME		8.	
II. EXEMPT EARNED INCOME		7. Subtotal (add 5 and 6)		9.	
Earned	a. b.	8. Child Support/Alimony Paid		10. Total allocations/deductions (add 5 through 9)	
Unearned income (8a and 8b)		9. Total Countable Income (7 minus 8)	475	11. Total net nonexempt Income (4 minus 10)	
Earned Inc. deduction unused S20		NOTE:		12. Total net nonexempt Income rounded	
Under (10 minus 11)		If there is income from which Educational Expenses are deducted (Section 50547), show calculations here. Enter net amount on line 3 or 4.		13. Maintenance need	
Countable earned Income (12 by 2)		Total income for educational purpose		a. MFBU members not in LTC No.	
Countable Income (and 13)		Less total educational expenses		b. MFBU members in LTC	
If the following deductions apply, complete Part VI before completing Column I:		Net countable income		c. Total maintenance need (13a + 13b)	
Medical Expenses	Section 50547	4000 LOSS		14. Share of cost (12 minus 13c)	
Child Support	Section 50541	-75		15. Underpayment adjustment	
Charitable Deduction	Section 50551	325 net*		16. Adjusted Share of Cost (14 minus 15)	
Us 1/3	Section 50551.1				
Expenses for the Blind	Section 50551.4				
Expenses for Self-Support	Section 50551.5				

Worker Signature

Worker Number

Computation Date

County Use

Example 2:

\$700 Unearned income received in the name of the LTC spouse*

\$400 Earned income received by at home spouse who is not linked to a Medi-Cal program.

1.	Community Property Unearned Income of LTC Spouse	\$700
2.	Community Property Income of at home Spouse	\$400
	$\begin{array}{r} \$ \quad 400 \\ \hline \text{Earned} \end{array} + \$ \begin{array}{r} -0- \\ \hline \text{Unearned} \end{array}$	
3.	Total	\$1100
4.	Each Spouse's Interest	\$550**

* entered LTC last month

** at-home spouse's interest consists of \$400 earned and \$150 unearned

County Use	Date This Form Effective
Case Number	Number in MFBU

CHILDREN WITH SEPARATE INCOME OR PROPERTY EXCLUDED FROM THE MFBU NO. _____

Maintenance need for MFBU plus excluded child(ren)	\$
Maintenance need for MFBU	\$
Excluded child(ren)'s share of maintenance need (line 1 minus line 2)	\$
Net nonexempt income of excluded child(ren)	\$
Allocation to excluded child(ren) (line 3 minus line 4)	\$

Enter above amount on MC 176 M, column III, line 5

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

SSI/SSP appropriate payment level (plus IHSS authorization for IHSS only)	\$	
Actual SSI/SSP payment (or IHSS payment)	\$	
Net nonexempt income used to determine grant (or IHSS) (line 1 minus line 2)	\$	
Gross unearned income of SSI/SSP IHSS recipient (other than grant or IHSS payment)	\$	
SSI/SSP unearned income deductions and exemptions	\$	
Net nonexempt unearned income (line 4 minus line 5)	\$	
Gross earned income of SSI/SSP IHSS recipient	\$	
SSI/SSP earned income deductions and exemptions	\$	
Net nonexempt earned income (line 7 minus line 8)	\$	
Total net nonexempt income (add lines 6 and 9)	\$	

If line 10 is greater than line 3, the difference is income available to the MFBU and is entered here on MC 176 M, column I or II, line 3, as "PA recipient income available"

If line 10 is less than line 3, the difference is the allocation to the SSI/SSP or IHSS recipient and is entered here and on MC 176 M, column III, line 6.

III. ALLOCATION FROM LTC OR BOARD AND CARE PERSON TO SPOUSE AND/OR CHILDREN AT HOME

1. Maintenance need for spouse and/or children at home (other than excluded children)	\$	509
2. Total countable income of spouse and/or nonexcluded children	\$	475
3. Total allocations/deductions of spouse and/or nonexcluded children	\$	
4. Total net nonexempt income of spouse and/or nonexcluded children (line 2 minus line 3)	\$	475
5. Unmet needs of spouse and/or nonexcluded children (line 1 minus line 5)	\$	34
6. Total countable income of person in LTC or board and care	\$	550
7. Health insurance for person in LTC or board and care	\$	
8. Total net nonexempt income of person in LTC or board and care (line 6 minus line 7)	\$	550
9.	\$	
10. Maintenance need for person in LTC or board and care	\$	35
11. Total amount needed for maintenance (add lines 9 and 10)	\$	35
12. Amount available for allocation to spouse and/or children (line 8 minus line 11)	\$	515
13. Allocation to spouse and/or children (line 5 or line 12, whichever is less)	\$	34

A For share of cost determination of the ABD person or the spouse of the ABD person, enter above amount on MC 176 M, Column III, line 3
 B For share of cost determination of spouse and/or children at home, enter above amount on MC 176 M, column II, line 4

Worker Signature	Worker Number	Date of Computation
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☐ New Application
 ☐ Redetermination
 ☐ Change
 ☐ Retroactive Elig.
 ☐ Correction

Effective Eligibility Date for this Budget

Mo.

Yr.

[illegible]

ome of MFBU members applying as aged,
id, or disabled plus income of spouse or
ent (except PA or other PA)

11. Income of MFBU members not listed in 1.
(except PA or other PA)

III. Share of cost computation

NEXEMPT UNEARNED INCOME			A. NONEXEMPT UNEARNED INCOME		1. Countable income from 1, 18	
	2. ABD-MN	b. Spouse or Parent	1. Social Security		2. Countable income from 11, 11	460
cial Security	480		2. Net Income from Property		3. Total countable eligibility income (add 1 and 2)	460
Income from Property			3. Other—itemize		DEDUCTIONS ADDED BACK FOR LTC SOC	
Net—itemize					4. ABD income deductions (e.g., any income deduction)	+ \$20
			4.		5. Other income deductions	
a) d 2 thru 4)					6. Total deductions added back (add 4 and 5)	20
DUCTIONS			5. Total unearned income (add 3 through 4)		7. Total countable income (add 3 and 6)	480
mainder minus 6)	a.	b.	6. Deductions		ALLOCATIONS AND DEDUCTIONS	
Combined unearned inc. (d 7a and 7b)	480		7. Countable unearned inc. (5 minus 6)		8. Allocation from LTC/B&C Income (176W, Part III)	20
ly income deduction	-\$20		B. NONEXEMPT EARNED INCOME		9. Allocation to excluded children (176W, Part I)	
Countable unearned income (8 minus 9)	460		8. Net earned Income (MC 176W, Part IV, Line 11)		10. Income to determine PA Eligibility	
NEXEMPT EARNED INCOME			9. Subtotal countable income (add 7 and 8)		11. Health Insurance	
Less Earned Income	a. 0	b.	10. Child Support/Alimony paid.		12. Total allocations/deductions (add 8 through 11)	20
DUCTIONS			11. Total countable income (9 minus 10)	0	13. Total net nonexempt income (7 minus 12)	460
mainder minus 12)	a.	b.			14. Total net nonexempt income rounded	
Combined earned inc. (d 13a and 13b)					15. Maintenance need	
Less earned inc. deduction (d 3 unused \$20)					a. MFBU members not in LTC No.	
mainder minus 15)					b. MFBU members in LTC	
Countable earned inc. (16 minus 15)	460				• Personal needs	
Total countable inc. (d 10 and 17)	460				• Upkeep of home	
EMPT INCOME					• Needs of disabled dependents	
					c. Total maintenance need (15a + 15b)	25
					16. Share of cost (14 minus 15)	440
					17. Underpayment adjustment	
					18. Adjusted Share of Cost (17 minus 18)	

Application ☐ Redetermination ☐ Change ☐ Retroactive Elig. ☐ Correction

Effective Eligibility Date for this Budget

Mo. Yr.

State Number			Name - First, Middle, Last		Birthdate		Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Coverage
7 Digit Serial No.	MFBU No.	Pers. No.			Mo.	Day	Yr.		
			Aged at-home spouse					(1)	
								(2)	
								(1)	
								(2)	
								(1)	
								(2)	
								(1)	
								(2)	
								(1)	
								(2)	

ome of MFBU members applying as aged, blind, disabled plus income of spouse or parent (except PA or other PA)

II. Income of MFBU members not listed in I. (except PA or other PA)

III. Share of cost computation

IV. EXEMPT UNEARNED INCOME

	a. ABD-MN	b. Spouse or Parent
DI	527	
Income from Property		
or-Itemize		

1 thru 4)	
ined unearned income (5a and 5b)	527
Income deduction	-S20
stable unearned Income (minus 7)	507

	a.	b.
s Earned		
me		
ined earned Income (9a and 9b)		
earned Inc. deduction (S unused S20)		
ainder (10 minus 11)		
table earned Income (12 by 2)		
ountable Income (8 and 13)		

	a.	b.
s Earned		
me		
ined earned Income (9a and 9b)		
earned Inc. deduction (S unused S20)		
ainder (10 minus 11)		
table earned Income (12 by 2)		
ountable Income (8 and 13)		

the following deductions apply, complete V, Part VI before completing Column I:
ational Expenses
nt Parent Support
nt Deduction
ilus 1/3
Expenses for the Blind
ne for Self-Support

ational Expenses	Section 50547
nt Parent Support	Section 50541
nt Deduction	Section 50551
ilus 1/3	Section 50551.1
Expenses for the Blind	Section 50551.4
ne for Self-Support	Section 50551.5

ational Expenses	Section 50547
nt Parent Support	Section 50541
nt Deduction	Section 50551
ilus 1/3	Section 50551.1
Expenses for the Blind	Section 50551.4
ne for Self-Support	Section 50551.5

A. NONEXEMPT UNEARNED INCOME

1. OASDI	
2. Net Income from Property	
3. Other-Itemize	
4.	
5. Total unearned Income (add 1 thru 4)	

B. NONEXEMPT EARNED INCOME

6. Total Net Earned Income (MC 176W, Part IV, Line 11.)	
---	--

C. TOTAL COUNTABLE INCOME

7. Subtotal (add 5 and 6)	
---------------------------	--

8. Child Support/Alimony Paid	
-------------------------------	--

9. Total Countable Income (7 minus 8)	
---------------------------------------	--

NOTE:
If there is income from which Educational Expenses are deducted (Section 50547), show calculations here. Enter net amount on line 3 or 4.

Total income for educational purpose

Less total educational expenses

Net countable income

1. Countable Income from I 14

2. Countable Income from I 9	
------------------------------	--

3. Income allocated from LTC/B&C person to family members at home (176W, Part III)	
--	--

4. Combined Countable Income (add 1, 2, and 3)	
--	--

ALLOCATIONS AND DEDUCTIONS

5. Allocation to excluded children (176W, Part I)	
---	--

6. Income to determine PA Eligibility	
---------------------------------------	--

7. Health Insurance	
---------------------	--

8.	
----	--

9.	
----	--

10. Total allocations/deductions (add 5 through 9)	
--	--

11. Total net nonexempt Income (4 minus 10)	
---	--

12. Total net nonexempt Income rounded	
--	--

13. Maintenance need	
----------------------	--

a. MFBU members not in LTC No.	
--------------------------------	--

b. MFBU members in LTC	
------------------------	--

c. Total maintenance need (13a + 13b)	
---------------------------------------	--

14. Share of cost (12 minus 13c)	
----------------------------------	--

15. Underpayment adjustment	
-----------------------------	--

16. Adjusted Share of Cost (14 minus 15)	
--	--

net Income

Worker Signature

Worker Number

Computation Date

County Use

Name Example 3

County Use _____ Date This Form Effective _____
Case Number _____ Number In MFBU _____

CHILDREN WITH SEPARATE INCOME OR PROPERTY EXCLUDED FROM THE MFBU NO. _____

Maintenance need for MFBU plus excluded child(ren)	\$
Maintenance need for MFBU	\$
Excluded child(ren)'s share of maintenance need (line 1 minus line 2)	\$
Net nonexempt income of excluded child(ren)	\$
Allocation to excluded child(ren) (line 3 minus line 4)	\$
Enter above amount on MC 176 M, column III, line 5	

SSI/SSP OR IHSS RECIPIENT(S) IN FAMILY—INCOME AVAILABLE/LOCATED

SSI/SSP appropriate payment level (as IHSS authorization for IHSS only)	\$	
Actual SSI/SSP payment (or IHSS payment)	\$	
Net nonexempt income used to determine grant (or IHSS) (line 1 minus line 2)	\$	
Unearned income of SSI/SSP or IHSS recipient (other than net or IHSS payment)	\$	
SSI/SSP unearned income deductions and exemptions	\$	
Net nonexempt unearned income (line 4 minus line 5)	\$	
Unearned income of SSI/SSP or IHSS recipient	\$	
SSI/SSP earned income deductions and exemptions	\$	
Net nonexempt earned income (line 7 minus line 8)	\$	
Actual net nonexempt income (line 6 and 9)	\$	
If line 10 is greater than line 3, the difference is income available to the MFBU and is entered here on MC 176 M, column I or II, line 3, as "PA client income available"		
If line 10 is less than line 3, the difference is the allocation to the SSI/SSP or IHSS recipient and is entered here and on MC 176 M, column III, line 6.		

III. ALLOCATION FROM LTC OR BOARD AND CARE PERSON TO SPOUSE AND/OR CHILDREN AT HOME

1. Maintenance need for spouse and/or children at home (other than excluded children)	\$	509
2. Total countable income of spouse and/or nonexcluded children	\$	504
3. Total allocations/deductions of spouse and/or nonexcluded children	\$	
4. Total net nonexempt income of spouse and/or nonexcluded children (line 2 minus line 3)	\$	507
5. Unmet needs of spouse and/or nonexcluded children (line 1 minus line 5)	\$	2
6. Total countable income of person in LTC or board and care	\$	480
7. Health insurance for person in LTC or board and care	\$	
8. Total net nonexempt income of person in LTC or board and care (line 6 minus line 7)	\$	480
9.	\$	
10. Maintenance need for person in LTC or board and care	\$	35
11. Total amount needed for maintenance (add lines 9 and 10)	\$	35
12. Amount available for allocation to spouse and/or children (line 8 minus line 11)	\$	445
13. Allocation to spouse and/or children (line 5 or line 12, whichever is less)	\$	2
A For share of cost determination of the ABD person or the spouse of the ABD person, enter above amount on MC 176 M, Column III, line 3		
B For share of cost determination of spouse and/or children at home, enter above amount on MC 176 M, column II, line 4		

Worker Signature _____ Worker Number _____ Date of Computation _____

Example 4:

\$700 Unearned income is received in the name of the LTC spouse*

\$865 Gross earned income is received from at-home spouse's employment**

\$120 Unearned income is received by the couple's 17 year old disabled child.

The entire family wants Medi-Cal.

1.	Community Property Unearned Income of LTC Spouse	\$700
2.	Community Property Income of at-home Spouse $\$ \frac{865}{\text{earned}} + \frac{-0-}{\text{unearned}}$	\$865
3.	Total	\$1565
4.	Each Spouse's Interest	\$782.50

* entered LTC last month

** This spouse is AFDC-MN on the basis of the incapacitated parent deprivation for the disabled child.

Example 4

County District

County Use

Application ☐ Redetermination ☐ Change ☐ Retroactive Elig. ☐ Correction

Effective Eligibility Date for this Budget
Mo. Yr.

State Number		Name - First, Middle, Last	Birthdate Mo. Day Yr.	Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Coverage
Aid	7 Digit Serial No.					
		LTC spouse			(1) (2)	
					(1) (2)	
					(1) (2)	
					(1) (2)	
					(1) (2)	
					(1) (2)	
					(1) (2)	
					(1) (2)	
					(1) (2)	

Income of MFBU members applying as aged, blind, or disabled plus income of spouse or dependent (except PA or other PA)

II. Income of MFBU members not listed in I. (except PA or other PA)

III. Share of cost computation

I. INEXEMPT UNEARNED INCOME		A. NONEXEMPT UNEARNED INCOME		1. Countable income from I, 18	
	2. ABD-MN		1. Social Security		690
Social Security	700		2. Net Income from Property		0
Income from Property			3. Other-Itemize		690
Other-Itemize			4.		DEDUCTIONS ADDED BACK FOR LTC SOC
(2)					4. ABD income deductions (e.g., any income deduction)
as 1 thru 4)					5. Other income deductions
Deductions			5. Total unearned income (add 1 through 4)		6. Total deductions added back (add 4 and 5)
remainder (minus 5)			6. Deductions		7. Total countable income (add 3 and 6)
Combined unearned inc. (add 2a and 7b)	700		7. Countable unearned inc. (5 minus 6)		ALLOCATIONS AND DEDUCTIONS
Income deduction	-520		B. NONEXEMPT EARNED INCOME		8. Allocation from LTC/S&C Income (176W, Part III)
Countable unearned income (8 minus 9)	690		8. Net earned income (MC 176W, Part IV, Line 11)		9. Allocation to excluded children (176W, Part I)
I. INEXEMPT EARNED INCOME			9. Subtotal countable income (add 7 and 8)		10. Income to determine PA Eligibility
Less Earned income deductions			10. Child support/Alimony paid		11. Health Insurance
remainder (minus 12)			11. Total countable income (9 minus 10)	0	12. Total allocations/deductions (add 8 through 11)
Combined earned inc. (add 13a and 13b)	0				13. Total net nonexempt income (7 minus 12)
Less earned inc. deduction (e.g., unused \$20)					14. Total net nonexempt income rounded
remainder (minus 15)					15. Maintenance need
Countable earned inc. (vice 16 by 2)					a. MFBU members not in LTC No.
Total countable inc. (add 10 and 17)	690				b. MFBU members in LTC <ul style="list-style-type: none">• Personal needs• Upkeep of home• Needs of disabled dependents
I. INEXEMPT INCOME					c. Total maintenance need (15a - 15b)
					16. Share of cost (14 minus 15)
					17. Underpayment adjustment

by Worker Signature/Computation Date

Worker Number

County Use

Application ☐ Redetermination ☐ Change ☐ Retroactive Elig. ☐ Correction

Effective Eligibility Date for this Budget

Mo. Yr.

State Number			Name - First, Middle, Last		Birthdate	Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Coverage
Id	7 Digit Serial No.	MFBU No.			Mo. Day Yr.			
A			at home spouse				(1)	
X			child				(2)	
							(1)	
							(2)	
							(1)	
							(2)	
							(1)	
							(2)	
							(1)	
							(2)	

me of MFBU members applying as aged, blind, disabled plus income of spouse or parent (except PA or other PA)

II. Income of MFBU members not listed in I. (except PA or other PA)

III. Share of cost computation

I. EXEMPT UNEARNED INCOME			A. NONEXEMPT UNEARNED INCOME		1. Countable Income from I 14	
	a. ABD-MN	b. Spouse or Parent	1. OASDI		2. Countable Income from II 9	500
DI	12.0		2. Net Income from Property		3. Income allocated from LTC/B&C person to family members at home (176W, Part III)	134
Income Property			3. Other-Itemize		4. Combined Countable Income (add 1, 2, and 3)	634
Income Itemize			4.		ALLOCATIONS AND DEDUCTIONS	
1 thru 4)			5. Total unearned Income (add 1 thru 4)		5. Allocation to excluded children (176W, Part I)	
Unearned income (a and 5b)	120		B. NONEXEMPT EARNED INCOME		6. Income to determine PA Eligibility	
Income deduction	-520		6. Total Net Earned Income (MC 176W, Part IV, Line 11.)		7. Health Insurance	
Countable unearned Income (minus 7)	100		C. TOTAL COUNTABLE INCOME		8.	
II. EXEMPT EARNED INCOME			7. Subtotal (add 5 and 6)		9.	
Earned	a.	b.	8. Child Support/Alimony Paid		10. Total allocations/deductions (add 5 through 9)	5
Unearned earned Income (a and 9b)		865	9. Total Countable Income (7 minus 8)	5	11. Total net nonexempt Income (4 minus 10)	634
Earned Inc. deduction (unused \$20)		65	NOTE: If there is income from which Educational Expenses are deducted (Section 50547), show calculations here. Enter net amount on line 3 or 4.			
Under (10 minus 11)		800	Total income for educational purpose		12. Total net nonexempt Income rounded	634
Countable earned Income (e 12 by 2)		400	Less total educational expenses		13. Maintenance need	
Countable Income (1 and 13)		500	Net countable income		a. MFBU members not in LTC No.	634
the following deductions apply, complete Part VI before completing Column I:			b. MFBU members in LTC			
Medical Expenses	Section 50547		• Personal needs			
Child Parent Support	Section 50541		• Upkeep of home			
Child Deduction	Section 50551		• Needs of disabled dependents			
Child 1/3	Section 50551.1		c. Total maintenance need (13a + 13b)			
Expenses for the Blind	Section 50551.4		14. Share of cost (12 minus 13c)			
Expenses for Self-Support	Section 50551.5		15. Underpayment adjustment			
			16. Adjusted Share of Cost (14 minus 15)			

pt Income

Worker Signature

Worker Number

Computation Date

County Use

Name Example 4

County Use _____ Date This Form Effective _____
Case Number _____ Number in MFBU _____

CHILDREN WITH SEPARATE INCOME OR PROPERTY EXCLUDED FROM THE MFBU NO.

Maintenance need for MFBU plus excluded child(ren)	\$
Maintenance need for MFBU	\$
Excluded child(ren)'s share of maintenance need (line 1 minus line 2)	\$
Net nonexempt income of excluded child(ren)	\$
Allocation to excluded child(ren) (line 3 minus line 4)	\$

Enter above amount on MC 176 M, column III, line 5

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

SSI/SSP appropriate payment level (plus IHSS authorization for IHSS family)	\$	
Actual SSI/SSP payment (or IHSS payment)	\$	
Net nonexempt income used to determine grant (or IHSS) (line 1 minus line 2)	\$	
Gross unearned income of SSI/SSP IHSS recipient (other than grant or IHSS payment)	\$	
SSI/SSP unearned income deductions and exemptions	\$	
Net nonexempt unearned income (line 4 minus line 5)	\$	
Gross earned income of SSI/SSP IHSS recipient	\$	
SSI/SSP earned income deductions and exemptions	\$	
Net nonexempt earned income (line 7 minus line 8)	\$	
Total net nonexempt income (add lines 6 and 9)	\$	
If line 10 is greater than line 3, the difference is income available to the MFBU and is entered here on MC 176 M, column I or II, line 3, as "Parental income available"	\$	
If line 10 is less than line 3, the difference is the allocation to the SSI/SSP or IHSS recipient and is entered here and on MC 176 M, column III, line 6.	\$	

III. ALLOCATION FROM LTC OR BOARD AND CARE PERSON TO SPOUSE AND/OR CHILDREN AT HOME

1. Maintenance need for spouse and/or children at home (other than excluded children)	\$	634
2. Total countable income of spouse and/or nonexcluded children	\$	500
3. Total allocations/deductions of spouse and/or nonexcluded children	\$	
4. Total net nonexempt income of spouse and/or nonexcluded children (line 2 minus line 3)	\$	500
5. Unmet needs of spouse and/or nonexcluded children (line 1 minus line 5)	\$	134
6. Total countable income of person in LTC or board and care	\$	700
7. Health insurance for person in LTC or board and care	\$	
8. Total net nonexempt income of person in LTC or board and care (line 6 minus line 7)	\$	700
9.	\$	
10. Maintenance need for person in LTC or board and care	\$	35
11. Total amount needed for maintenance (add lines 9 and 10)	\$	35
12. Amount available for allocation to spouse and/or children (line 8 minus line 11)	\$	665
13. Allocation to spouse and/or children (line 5 or line 12, whichever is less)	\$	134
A For share of cost determination of the ABD person or the spouse of the ABD person, enter above amount on MC 176 M, Column III, line 3		
B For share of cost determination of spouse and/or children at home, enter above amount on MC 176 M, column II, line 4		

By Worker Signature

Worker Number

Date of Computation

Example 5:

\$600 Unearned income is received in the name of the LTC spouse*

\$600 Unearned income is received in the name of the spouse at home the spouse states that \$200 of this amount is separate income received from an inheritance; only LTC spouse wants Medi-Cal.

1.	Community Property Unearned Income of LTC Spouse	\$600
2.	Community Property Income of at Home Spouse \$ <u>-0-</u> + \$ <u>400</u> Earned Unearned	\$400
3.	Total	\$1000
4.	Each Spouse's Interest	\$500

* entered LTC last month

CX 00116 5

County District County Use

Application ☐ Redetermination ☐ Change ☐ Retroactive Elig. ☐ Correction

Effective Eligibility Date for this Budget
Mo. Yr.

State Number		Name - First, Middle, Last		Birthdate	Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Covers
7 Digit Serial No.	MFBU No.			Mo. Day Yr.		(1) (2)	
			LTC spouse			(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	
						(1) (2)	

Income of MFBU members applying as aged, d, or disabled plus income of spouse or (except PA or other PA)

II. Income of MFBU members not listed in I. (except PA or other PA)

III. Share of cost computation

NONEXEMPT UNEARNED INCOME

A. NONEXEMPT UNEARNED INCOME

1. Countable income from I, 18

2. Countable income from II, 11

3. Total countable eligibility income (add 1 and 2)

DEDUCTIONS ADDED BACK FOR LTC SOC

4. AED income deductions (e.g., any income deduction)

5. Other income deductions

6. Total deductions added back (add 4 and 5)

7. Total countable income (add 3 and 6)

8. Allocation from LTC/B&C Income (176W, Part III)

9. Allocation to excluded children (176W, Part I)

10. Income to determine PA Eligibility

11. Health Insurance

12. Total allocations/deductions (add 8 through 11)

13. Total net nonexempt income (7 minus 12)

14. Total net nonexempt income rounded

15. Maintenance need

16. Share of cost (14 minus 15)

17. Underpayment adjustment

18. Adjusted Share of Cost (17 minus 18)

19. Countable earned income (13a minus 13b)

20. Countable earned income (13a minus 13b)

21. Countable earned income (13a minus 13b)

22. Countable earned income (13a minus 13b)

23. Countable earned income (13a minus 13b)

24. Countable earned income (13a minus 13b)

25. Countable earned income (13a minus 13b)

Application ☐ Redetermination ☐ Change ☐ Retroactive Elig. ☐ Correction

Effective Eligibility Date for this Budget

Mo. Yr.

State Number		Name - First, Middle, Last		Birthdate	Sex	(1) Social Security No. and (2) Health Insurance Claim No. or Railroad Retirement No.	Other Coverage
7 Digit Serial No.	MFBU No.			Mo. Day Yr.			
		at-home spouse				(1)	
		ineligible				(2)	
						(1)	
						(2)	
						(1)	
						(2)	
						(1)	
						(2)	
						(1)	
						(2)	
						(1)	
						(2)	

me of MFBU members applying as aged, blind, disabled plus income of spouse or parent (except PA or other PA)

II. Income of MFBU members not listed in I. (except PA or other PA)

III. Share of cost computation

EXEMPT UNEARNED INCOME

	a. ABD-MN	b. Spouse or Parent
DI		
Income		
Property		
Itemize		
1 thru 4)		
Unearned income (a and 5b)		
Income deduction	-S20	
Table unearned Income minus 7)		

A. NONEXEMPT UNEARNED INCOME

1. OASDI	
2. Net Income from Property	
3. Other-Itemize	
4. Insurance	500
5. Total unearned Income (add 1 thru 4)	700

1. Countable Income from I 14

2. Countable Income from II 9	700
3. Income allocated from LTC/B&C person to family members at home (176W, Part III)	
4. Combined Countable Income (add 1, 2, and 3)	

ALLOCATIONS AND DEDUCTIONS

5. Allocation to excluded children (176W, Part I)	
6. Income to determine PA Eligibility	
7. Health Insurance	
8.	
9.	

EXEMPT EARNED INCOME

	a.	b.
Earned		
Combined earned Income (9a and 9b)		
Earned Inc. deduction (unused S20)		
Under (10 minus 11)		
Table earned Income (12 by 2)		
Countable Income (13 and 13)		

B. NONEXEMPT EARNED INCOME

6. Total Net Earned Income (MC 176W, Part IV, Line 11.)	
---	--

C. TOTAL COUNTABLE INCOME

7. Subtotal (add 5 and 6)	
8. Child Support/Alimony Paid	
9. Total Countable Income (7 minus 8)	700

NOTE:

If there is income from which Educational Expenses are deducted (Section 50547), show calculations here. Enter net amount on line 3 or 4.

Total income for educational purpose	
Less total educational expenses	
Net countable income	

10. Total allocations/deductions (add 5 through 9)	
11. Total net nonexempt Income (4 minus 10)	
12. Total net nonexempt Income rounded	
13. Maintenance need	
a. MFBU members not in LTC No.	
b. MFBU members in LTC <ul style="list-style-type: none">• Personal needs• Upkeep of home• Needs of disabled dependents	
c. Total maintenance need (13a + 13b)	
14. Share of cost (12 minus 13c)	
15. Underpayment adjustment	
16. Adjusted Share of Cost (14 minus 15)	

If the following deductions apply, complete Part VI before completing Column I:

Additional Expenses	Section 50547
Parent Support	Section 50541
Net Deduction	Section 50551
Plus 1/3	Section 50551.1
Expenses for the Blind	Section 50551.4
For Self-Support	Section 50551.5

Countable Income

COMPUTATION WORKSHEET

Name <u>Example 5</u>	County Use	Date This Form Effective
	Case Number	Number in MFBU

CHILDREN WITH SEPARATE INCOME OR PROPERTY EXCLUDED FROM THE MFBU NO. _____

Maintenance need for MFBU plus excluded child(ren)	\$
Maintenance need for MFBU	\$
Excluded child(ren)'s share of maintenance need (line 1 minus line 2)	\$
Net nonexempt income of excluded child(ren)	\$
Allocation to excluded child(ren) (line 3 minus line 4)	\$

Enter above amount on MC 176 M, column III, line 5

SSI/SSP OR IHSS RECIPIENT(S) IN FAMILY—INCOME AVAILABLE/LOCATED

SSI/SSP appropriate payment level as IHSS authorization for IHSS (iv)	\$	
Total SSI/SSP payment (IHSS payment)	\$	
Net nonexempt income used to determine grant (or IHSS) (line 1 minus line 2)	\$	
SSI unearned income of SSI/SSP IHSS recipient (other than net or IHSS payment)	\$	
SSI/SSP unearned income deductions and exemptions	\$	
Net nonexempt unearned income (line 4 minus line 5)	\$	
SSI earned income of SSI/SSP IHSS recipient	\$	
SSI earned income deductions and exemptions	\$	
Net nonexempt earned income (line 7 minus line 8)	\$	
Net nonexempt income (lines 6 and 9)	\$	
If line 10 is greater than line 3, the difference is the amount available to the MFBU and is entered here on MC 176 M, column I or II, line 3, as "Parent income available"	\$	
If line 10 is less than line 3, the difference is the amount allocated to the SSI/SSP or IHSS recipient and entered here and on MC 176 M, column III, line 6.	\$	

III. ALLOCATION FROM LTC OR BOARD AND CARE PERSON TO SPOUSE AND/OR CHILDREN AT HOME

1. Maintenance need for spouse and/or children at home (other than excluded children)	\$	509
2. Total countable income of spouse and/or nonexcluded children	\$	1700
3. Total allocations/deductions of spouse and/or nonexcluded children	\$	
4. Total net nonexempt income of spouse and/or nonexcluded children (line 2 minus line 3)	\$	1700
5. Unmet needs of spouse and/or nonexcluded children (line 1 minus line 5)	\$	5
6. Total countable income of person in LTC or board and care	\$	
7. Health insurance for person in LTC or board and care	\$	
8. Total net nonexempt income of person in LTC or board and care (line 6 minus line 7)	\$	
9.	\$	
10. Maintenance need for person in LTC or board and care	\$	
11. Total amount needed for maintenance (add lines 9 and 10)	\$	
12. Amount available for allocation to spouse and/or children (line 8 minus line 11)	\$	
13. Allocation to spouse and/or children (line 5 or line 12, whichever is less)	\$	
A For share of cost determination of the ABD person or the spouse of the ABD person, enter above amount on MC 176 M, Column III, line 3		
B For share of cost determination of spouse and/or children at home, enter above amount on MC 176 M, column II, line 4		

Worker Signature

Worker Number

Date of Computation