
MEDICAID ELIGIBILITY
FORMS AND INSTRUCTIONS

DOM-337 - ELIGIBLE INDIVIDUAL/ELIGIBLE COUPLE & SPOUSE TO SPOUSE
DEEMING WORKSHEET

PURPOSE & USE

This form is used to determine income eligibility for individuals or couples who live at-home. Refer to Section H, Budgeting for At-Home Eligibility, for policy regarding at-home eligibility.

THIS FORM IS GENERATED BY MEDS BUT IS AVAILABLE IN HARDCOPY IF NEEDED.

INSTRUCTIONS

Prepare an original only for the case record.

STEP 1. INDIVIDUAL OR ELIGIBLE COUPLE
CALCULATION

This portion is used to determine the eligible individual/couple eligibility using the income of the eligible only or the combined income of an eligible couple.

- 1.a. If the eligible receives VA Aid & Attendance, use this space to subtract the portion designated as Aid & Attendance from the VA payment. Specify in the space provided the type of VA payment received by the eligible, such as pension, compensation, etc.
- 1.b. If the eligible receives a VA benefit which includes a dependent(s) allocation, use this space to deduct the allocation from the eligible's benefit, if appropriate. If 1.a. is completed, deduct the dependent's allocation from the 1.a. total. Specify the type benefit received by the eligible in the space provided.

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- 1.c. List the type(s) and amount(s) of all unearned income received by the eligible. **DO NOT LIST ANY INCOME BASED ON NEED RECEIVED BY THE ELIGIBLE**, as this type of income is added in 1.f. Bring down the amount of the VA payment to be used in budgeting (1.a. or 1.b. total) provided the VA payment is not based on need. If the VA payment is based on need, the 1.a. or 1.b. total is added in 1.f.
- 1.d. Subtract any appropriate SSI/SSA disregard totals, if applicable. Show the computation of the disregarded amount(s) in the space provided in the lower right corner of page 1.
- Note: Do not mix budgeting procedures, i.e., only COL applicants are eligible for COL disregards. Do not allow SSI disregards when budgeting for Poverty Level or QMB applicants.
- 1.e. Subtract the general exclusion from the 1.c. or 1.d. total.
- 1.f. Add any income based on need received by the eligible to the 1.e., subtotal and specify the type of payment (such as VA pension) that the income represents.
- 1.g. Enter the total countable unearned income.
- 1.h. List all type(s) and gross amount(s) of earned income, if applicable.
- 1.i. Enter the total gross earned income.
- 1.j. Enter the total countable earned income after all deductions have been applied.
- 1.k. Enter the totals from 1.g. and 1.j. and add together to arrive at the total countable income.

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- 1.1. Enter the appropriate SSI FBR or Federal Poverty Level (FPL) for an individual or couple and subtract the total countable income taken from the 1.k., total.

If the total is equal to or exceeds the applicable FBR or if the total exceeds the appropriate FPL, the individual or couple is not Medicaid eligible. Do not continue. If a deficit results, the client is eligible based on his/her income and Steps 2 and 3 must be completed if an individual has an ineligible spouse.

STEP 2 - INELIGIBLE SPOUSE CALCULATION

This portion is completed if the eligible has an ineligible spouse at home.

- 2.a. Enter the ineligible spouse's total unearned income. Do not consider any income based on need received by the ineligible spouse or any income used to budget the income based on need. It may be necessary to contact the agency (such as Human Services, VA) to determine what income is used to budget the ineligible spouse's payment.

Subtract Allocation for Ineligible Child(ren) - If there is a dependent child (under age 18 or under 21 and a student) in the household, complete the allocation portion by entering each child's name in the space provided, an allocation for each child from the SSI Payment Table, and subtracting each child's own income to arrive at the total allocation for each child. Add all total allocations and subtract the total allocation from the ineligible spouse's unearned income. This equals the remaining unearned income.

- 2.b. Enter the ineligible spouse's earned income. If any unused child's allocation remains from 2.a., subtract the remainder from the earned income to arrive at the remaining earned income.

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- 2.c. Add remaining unearned income total from 2.a. to the amount in 2.b.
- 2.d. Total Income After Allocations - The sum of 2.a. and 2.b. equal the income after allocating. If this total is less than the difference between the couple and individual SSI FBR or less than the difference between the couple and individual Poverty Levels (whichever is appropriate for the type of budgeting involved) then no deeming applies. Do not complete Step 3 as the eligible individual is eligible.

STEP 3 - COMBINED INCOMES AFTER ALLOCATING

This portion is completed if the eligible has an ineligible spouse at home.

- 3.a. Enter the eligible's unearned income taken from the Step 1.d. Subtotal in the first space.

Enter the ineligible spouse's remaining unearned income from Step 2.a. in the 2nd space and add this amount to the eligible's unearned income.

Subtract the \$20 General Exclusion

Add any income based on need received by the eligible (not any received by the ineligible). This figure is taken from Step 1.f.

This procedure equals the couple's countable unearned income.

- 3.b. Enter the eligible's gross earned income and add this amount to any remaining earned income from Step 2.b. belonging to the ineligible spouse. Apply the applicable deductions to earned income to arrive at the couple's countable earned income.

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- 3.c. Add together the totals from Step 3.a. and 3.b. to arrive at the total countable income,
- 3.d. Enter the couple FBR or FPL and subtract the total countable income from the FBR or FPL. If the couple's income is equal to or exceeds the SSI FBR or if income exceeds the FPL, the client is not Medicaid eligible. If a deficit results, the client is eligible based on income.

Instructions for Deeming from Ineligible Spouse to Eligible Individual and Eligible Child

1. Apply the rules of spouse to spouse deeming.
2. If spouse is eligible for Medicaid, there is no income to be deemed to eligible child.
3. If spouse is ineligible (determined in Step 3.d. on this worksheet), deem remaining income to eligible child(ren). Remaining income is that income over the amount needed to reduce the eligible spouse to zero payment. Transfer the countable income from Step 3.d. and the Monthly FBR for a couple, Step 3.d., to the Parent to Child Deeming Worksheet, Form 338, under "Additional Computation Space." Subtract these amounts to obtain the amount of income deemed to the child(ren). Enter this amount in Step 2 of Parent to Child Deeming Worksheet as unearned income and proceed with the remaining steps in Step 2 to determine child(ren)'s eligibility.

ELIGIBLE INDIVIDUAL/ELIGIBLE COUPLE &
SPOUSE TO SPOUSE DEEMING WORKSHEET

Case Name _____

Case No. _____

INDIVIDUAL OR ELIGIBLE COUPLE CALCULATION	STEP	<p>1. UNEARNED INCOME COMPUTATION</p> <p>a. If applicable, subtract portion of VA that is Aid & Attendance</p> <p>VA _____ (specify type of VA)</p> <p>less Aid & Attendance - _____</p> <p>TOTAL _____</p> <p>b. If applicable, subtract portion of VA that is dependent's allocation (Use 1a total, if applicable)</p> <p>VA _____ (specify type of VA)</p> <p>less dependent's allo. - _____</p> <p>TOTAL _____</p> <p>c. List below the type(s) and amount(s) of all unearned income. Include VA total from 1a or 1b, whichever applies (Total VA is included in either 1c or 1f, depending on the type of VA.)</p> <p>_____</p> <p>_____ + _____</p> <p>_____ + _____</p> <p style="text-align: right;">Sub Total _____</p> <p>d. Subtract HR-1 and/or COL Disregard(s) - _____</p> <p style="text-align: right;">Sub Total _____</p> <p>e. Subtract General Exclusion - 20.00</p> <p style="text-align: right;">Sub Total _____</p> <p>f. Add Income Based on Need rec'd by the Eligible Specify _____ + _____</p> <p>g. COUNTABLE UNEARNED INCOME _____</p>	h.	<p>EARNED INCOME COMPUTATION (List type(s) and gross amount(s))</p> <p>_____</p> <p>_____ + _____</p> <p>_____ + _____</p> <p>1. GROSS EARNED _____</p> <p>Subtract Portion of \$20 Not Used in Step 1e. - _____</p> <p style="text-align: right;">Sub Total _____</p> <p>Subtract Work Exclusion - 65.00</p> <p>2) _____</p> <p style="text-align: right;">Sub Total _____</p> <p>Subtract 1/2 Remainder - _____</p> <p style="text-align: right;">Sub Total _____</p> <p>Other Deductions Specify _____ - _____</p> <p>j. COUNTABLE EARNED INCOME _____</p> <p>k. COUNTABLE UNEARNED (1g) _____</p> <p>COUNTABLE EARNED (1j) + _____</p> <p>TOTAL COUNTABLE INCOME _____</p> <p>1. Appropriate FBR or FPL (Individual or Couple) _____</p> <p>less TOTAL COUNTABLE INCOME (1k) - _____</p> <p>IF "0" OR SURPLUS, NOT ELIGIBLE--DO NOT CONTINUE</p>
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Worker Signature _____

Date _____

STEP 2	INELIGIBLE SPOUSE CALCULATION	a.	Ineligible Spouse's Unearned Income (Do not include income based on need rec'd by spouse <u>or</u> any income used to budget this income) \$ _____ Subtract Allocation for Ineligible Child(ren) Child's Name _____ Allocation _____ Subtract Child's Own Income - - - - - Total _____ Allocation + + + = -		
		REMAINING UNEARNED INCOME			
		b.	Ineligible Spouse's Earned Income Subtract Remaining Child's Allocation Not Offset in 2a. -		
		REMAINING EARNED INCOME			
		c.	Add Remaining Unearned Income Total from 2a. +		
d.	TOTAL INCOME AFTER ALLOCATIONS - IF LESS THAN THE DIFFERENCE BETWEEN THE COUPLE AND INDIVIDUAL FPL OR THE COUPLE AND INDIVIDUAL SSI FBR (WHICHEVER IS APPROPRIATE) - NO DEEMING APPLIES, DO NOT CONTINUE.				
STEP 3	COMBINED INCOMES AFTER ALLOCATING	a.	Eligible's Unearned From Step 1d. Sub Total _____ Ineligible's REMAINING UNEARNED INCOME (2a.) + _____ Sub Total _____ Subtract General Exclusion - 20.00 _____ Sub Total _____ Add Eligible's Income Based on Need (Step 1f) + _____ COUNTABLE UNEARNED INCOME _____		
		b.	GROSS EARNED (Step 1i) _____ Ineligible's REMAINING EARNED INCOME (Step 2b) + _____ Sub Total _____ Subtract Portion of \$20 Not Used in 3a. - _____ Sub Total _____ Subtract Work Expense - 65.00 _____ 2) Sub Total _____ Subtract 1/2 Remainder - _____ COUNTABLE EARNED INCOME _____		
		c.	Countable Unearned (3a.) _____ Countable Earned (3b.) + _____ Total Countable Income _____		
		d.	FBR or FPL for Couple _____ Subtract Total Countable Income (3c.) - _____ IF "0" OR SURPLUS, NOT ELIGIBLE		