

**NORTH CAROLINA DIVISION OF HEALTH BENEFITS  
ADULT BUDGET SHEET**

Case Name: \_\_\_\_\_ Case Number: \_\_\_\_\_ Date: \_\_\_\_\_

Individual Applying as: \_\_\_\_\_ Medicaid Individual – Complete Section A  
 \_\_\_\_\_ Medicaid Couple – Complete Section C  
 \_\_\_\_\_ Medicaid Individual w/Ineligible Spouse (spousal deeming) – Complete Section A, to determine whether to go on to Sections B and C  
 \_\_\_\_\_ If not eligible for MAABD/MQB-Q, Complete Section D.

**SECTION A**

<b>INDIVIDUAL CALCULATION:</b>	Mo/Yr	Mo/Yr	Mo/Yr	Mo/Yr
<b>UNEARNED INCOME</b>				
1. Enter A/R's Total GROSS Unearned Income				
2. Subtract \$20 General Exclusion (Subtract \$0 from VA Pension)	<b>-20</b>			
3. Net Unearned Income (Line 1 minus Line 2)				
<b>EARNED INCOME: (Go to Line 11 if no earned income)</b>				
4. Enter A/R's Total GROSS Earned Income after allowable operational expenses.				
5. Subtract remainder of \$20 General Exclusion if any not used by Unearned Income.				
6. Subtotal (Line 4 minus Line 5)				
7. Subtract \$65 Earned Income Exclusion				
8. Subtotal (Line 6 minus Line 7)				
9. Subtract ½ of Line 8				
10. Net Earned Income (Line 8 minus Line 9)				
<b>TOTAL INCOME</b>				
11. Total Net Countable Income (Line 3 plus Line 10)				
12. INDIVIDUAL Maintenance Amount (CN/MN/MQB/M-WD)				
13. Excess (Line 11 minus Line 12) (For MNx6 = 6 month deductible)				

**SECTION B**

<b>DEEMING FROM INELIGIBLE SPOUSE: Use to budget a Medicaid Individual with an Ineligible Spouse (Spouse to spouse deeming).</b>	Mo/Yr	Mo/Yr	Mo/Yr	Mo/Yr
<b>UNEARNED INCOME</b>				
1. Enter Ineligible Spouse's <b>GROSS UNEARNED</b> Income (Do not deem if VA Pension)				
2. Subtract Living Allowance for Ineligible Child(ren) minus the Child(ren)'s Income				
3. Ineligible Spouse's <b>UNEARNED</b> Income to include in Section C (Line 1 minus Line 2)				
<b>EARNED INCOME</b>				
4. Enter Ineligible Spouse's <b>GROSS EARNED</b> Income.				
5. Subtract any portion of Living Allowance not subtracted from Unearned Income.				
6. Ineligible Spouse's <b>EARNED</b> Income to include in Section C (Line 4 minus Line 5)				
7. <b>Total Net Countable Income</b> (Line 3 plus Line 6) If the ineligible spouse's income is less than or equal to the current Living Allowance amount for N, Q, B, E or ½ the MN amount for M, <b>DO NOT DEEM any income to the a/r.</b>				

**SECTION C**

<b>COUPLE or SPOUSE TO SPOUSE DEEMING CALCULATION</b>	Mo/Yr	Mo/Yr	Mo/Yr	Mo/Yr
<b>UNEARNED INCOME</b>				
1. a. Enter Total Gross Unearned Income of the couple. <b>OR</b> b. Enter Unearned Income of a/r (amount on Line 1 of Section A) <b>PLUS</b> Enter ineligible spouse's deemed unearned income (Amount on Line 3 Section B)				
2. Subtract \$20 General Exclusion (Subtract \$0 if only income is VA Pension)				
3. Net Unearned Income (Line 1 minus Line 2)				
<b>EARNED INCOME (Go to Line 11 if no Earned Income)</b>				
4. a. Total GROSS Earned Income of Medicaid Couple <b>OR</b> b. Enter Total Gross Earned Income of A/R <b>PLUS</b> Earned Income deemed from Ineligible Spouse (Line A.4 plus EARNED Income From Line B.6)				
5. Subtract remainder of \$20 General Exclusion if any not used by Unearned Income				
6. Subtotal (Line 4 minus Line 5)				
7. Subtract \$65 Work Expense exclusion				
8. Subtotal (Line 6 minus Line 7)				
9. Subtract 1/2 of Line 8				
10. Net Earned Income (Line 8 minus Line 9)				
<b>TOTAL INCOME</b>				
11. Total Net Income (Line 3 plus Line 10)				
12. Couple Income Maintenance Amount (CN/MN/MQB/M-WD)				
13. Excess (Line 11 minus Line 12) (For MNx6 = 6 month deductible)				

**SECTION D**

**MQB FAMILY SIZE BUDGETING METHODOLOGY: For Individuals Applying as:**  
 Medicaid Individual w/Ineligible Spouse **AND/OR**  
 Medicaid Individual w/children in the home for whom he/spouse bear financial responsibility **AND/OR**  
 Medicaid Couple w/children in the home for whom he/spouse bear financial responsibility  
**Complete above sections as applicable using SSI budgeting methodology to first establish ineligibility for MAABD/ MQB-Q prior to proceeding with Section D.**

<b>Income Calculation (include countable unearned/earned income of the A/R and any family member who is financially responsible for the A/R)</b>	Mo/Yr	Mo/Yr	Mo/Yr	Mo/Yr
<b>UNEARNED INCOME</b>				
1. Enter Total Gross Unearned Income				
2. Subtract \$20 General Exclusion (Subtract \$0 if only income is VA Pension)				
3. Net Unearned Income (Line 1 minus Line 2)				
<b>EARNED INCOME (Go to Line 11 if no Earned Income)</b>				
4. a. Total GROSS Earned Income				
5. Subtract remainder of \$20 General Exclusion if any not used by Unearned Income				
6. Subtotal (Line 4 minus Line 5)				
7. Subtract \$65 Work Expense exclusion				
8. Subtotal (Line 6 minus Line 7)				
9. Subtract 1/2 of Line 8				
10. Net Earned Income (Line 8 minus Line 9)				
<b>TOTAL INCOME</b>				
11. Total Net Income (Line 3 plus Line 10)				
12. Number in Needs Unit _____ = Maintenance Amount Based on Family Size MQB				
13. Excess (Line 11 minus Line 12).				
<b>System limitations: Income Entered _____ Actual Income _____</b>				
<b>Maintenance Amt Entered _____ Actual Maintenance Amt _____</b>				