

**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

INDIVIDUAL CALCULATION:	Mo/Yr	Mo/Yr	Mo/Yr	Mo/Yr
UNEARNED INCOME				
1. Enter A/B's Total GROSS Unearned Income				
2. Subtract \$20 General Exclusion (Subtract \$0 from VA Pension)				
3. Net Unearned Income (Line 1 minus Line 2)				
EARNED INCOME: (Go to Line 11 if no earned income)				
4. Enter A/B'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)				
TOTAL INCOME				
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

DEEMING FROM INELIGIBLE SPOUSE: Use to budget a Medicaid Individual with an Ineligible Spouse (Spouse to spouse deeming).	Mo/Yr	Mo/Yr	Mo/Yr	Mo/Yr
UNEARNED INCOME				
1. Enter Ineligible Spouse's GROSS Unearned 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 Unearned Income to include in Section C (Line 1 minus Line 2)				
EARNED INCOME				
4. Enter Ineligible Spouse's GROSS Earned Income.				
5. Subtract any portion of Living Allowance not subtracted from Unearned Income.				
6. Ineligible Spouse's Earned Income to include in Section C (Line 4 minus Line 5)				
7. Total Net Countable Income (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, DO NOT DEEM any income to the a/b.				

SECTION C

COUPLE or SPOUSE TO SPOUSE DEEMING CALCULATION	Mo/Yr	Mo/Yr	Mo/Yr	Mo/Yr
UNEARNED INCOME				
1. a. Enter Total GROSS Unearned Income of the couple. OR b. Enter GROSS Unearned Income of a/b (amount on Line 1 of Section A) PLUS 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)				
EARNED INCOME (Go to Line 11 if no Earned Income)				
4. a. Total GROSS Earned Income of Medicaid Couple OR b. Enter Total GROSS Earned Income of A/B PLUS 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)				
TOTAL INCOME				
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 they/spouse bear financial responsibility AND/OR
 Medicaid Couple w/children in the home for whom they/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.

Income Calculation (include countable unearned/earned income of the A/B and any family member who is financially responsible for the A/B)	Mo/Yr	Mo/Yr	Mo/Yr	Mo/Yr
UNEARNED INCOME				
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)				
EARNED INCOME (Go to Line 11 if no Earned Income)				
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)				
TOTAL INCOME				
11. Total Net Income (Line 3 plus Line 10)				
12. Number in Needs Unit _____ = MQB Maintenance Amount Based on Family Size				
13. Excess (Line 11 minus Line 12).				