

**ABD Medicaid Individual/Couple/Spouse to Spouse Deeming Budget Sheet**

AU Name: \_\_\_\_\_ AU # \_\_\_\_\_

Class of Assistance: \_\_\_\_\_ Living Arrangement: \_\_\_\_\_ Date: \_\_\_\_\_

<b>Section A- Individual Calculation:</b> Use to budget a Medicaid Individual OR a Medicaid Individual with an Ineligible Spouse (Spouse to Spouse Deeming) in LA-A or LA-B. Not for use on Medicaid Cap budgeting.	Mo/Yr	Mo/Yr	Mo/Yr	
<b>UNEARNED INCOME</b>				
1. Enter A/R's Total GROSS Unearned Income				
2. Subtract \$20 General Deduction. (Subtract \$0 from IBON)				
3. Net Unearned Income (Line 1 minus Line 2)				
<b>Earned Income</b> (Go to Line 11 if no earned income)				
4. Enter A/R's Total GROSS Earned Income.				
5. Subtract remainder of \$20 General Deduction.				
6. Subtotal (Line 4 minus Line 5)				
7. Subtract \$65 Earned Income Deduction.				
8. Subtotal (Line 6 minus Line 7)				
9. Subtract 1/2 of Line 8.				
10. Subtotal (Line 8 minus Line 9)				AMN 3
<b>TOTAL INCOME</b>				Mo BP
11. Total Net Income (Line 3 plus Line 10)				
12. INDIVIDUAL Income Limit (FBR, Q-track, MNIL)				
13. Surplus/Deficit OR 1 <sup>st</sup> Potential AMN Spenddown (Line 11 minus Line 12)				

NOTE: If a surplus exists on Line A.13, **STOP** (the A/R is ineligible) unless AMN. If a deficit exists or the COA is AMN, continue.  
 NOTE: For Q Track eligibility, A/R must be eligible for the COA as an individual (Section A), in order to meet eligibility for the same COA as an individual with an ineligible spouse (Section C). Example: A/R is SLMB eligible as an individual (Section A) but appears to be QMB eligible under Spouse to Spouse Deeming budget (Section C). A/R will only eligible for SLMB, since s/he is ineligible for QMB as an individual.

<b>Section B- Deeming From Ineligible Spouse:</b> Use to budget a Medicaid Individual with an Ineligible Spouse (Spouse to Spouse Deeming) in LA-A or LA-B.	Mo/Yr	Mo/Yr	Mo/Yr	
<b>UNEARNED INCOME</b>				
1. Enter Ineligible Spouse's GROSS UNEARNED Income (Exclude IBON)				
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)				
<b>Earned Income</b>				
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)				

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See REVERSE SIDE for Continuation of Budgeting

AMN Only: If the combined total of Lines B.3 and B.6 does NOT exceed ½ the Individual MNIL, STOP and use the 1<sup>st</sup> Potential Spenddown from Line A.13 as the AMN Spenddown.

<b>Section C- Spouse-to-Spouse Deeming or Couple Calculation:</b> Use to budget a Medicaid Individual with an Ineligible Spouse (Spouse to Spouse Deeming) OR a Medicaid Couple in LA-A or LA-B.	Mo/Yr	Mo/Yr	Mo/Yr	
<b>UNEARNED INCOME</b>				
1. Enter Total GROSS Unearned Income of A/R and Unearned Income deemed from Ineligible Spouse (Line A.1 plus UNEARNED Income from Line B.3) OR Total GROSS Unearned Income of Medicaid Couple.				
2. Subtract \$20 General Deduction. (Subtract \$0 from IBON)				
3. Net Unearned Income (Line 1 minus Line 2)				
<b>Earned Income (Go to Line 11 if no earned income)</b>				
4. Enter Total GROSS Earned Income of A/R and Earned Income deemed from Ineligible Spouse (Line A.4 plus EARNED Income from Line B.6) OR Total GROSS Earned Income of Medicaid Couple				
5. Subtract remainder of \$20 General Deduction.				
6. Subtotal (Line 4 minus Line 5)				
7. Subtract \$65 Earned Income Deduction.				
8. Subtotal (Line 6 minus Line 7)				
9. Subtract ½ of Line 8.				
10. Subtotal (Line 8 minus Line 9)				AMN 3
<b>TOTAL INCOME</b>				Mo BP
11. Total Net Income (Line 3 plus Line 10)				
12. COUPLE Income Limit (FBR, Q-track, MNIL)				
13. Surplus/Deficit OR 2 <sup>nd</sup> Potential AMN Spenddown (Line 11 minus Line 12)				

AMN Only: Use the 1<sup>st</sup> Potential Spenddown (Line A.13) or 2<sup>nd</sup> Potential Spenddown (Line C.13), whichever is greater.

NOTE: For Q Track eligibility, A/R must be eligible for the COA as an individual (Section A), in order to meet eligibility for the same COA as an individual with an ineligible spouse (Section C). Example: A/R is SLMB eligible as an individual (Section A) but appears to be QMB eligible under Spouse to Spouse Deeming budget (Section C). A/R will only eligible for SLMB, since s/he is ineligible for QMB as an individual.

**Documentation/Computation Space:**