South Carolina Department of Health and Human Services
ABD/QMB/SLMB WORKSHEET

Primary Individual:				
	First	Middle	Last	Household Number
Date:	☐ Application	☐ Review	☐ Re-budget	

Budget Group	DOB	Rel.	MS	Non-Financial Criteria Met For ABD (Yes or No)	Non-Financial Criteria Met For QMB (Yes or No)	Social Security Number	Medicare Number
1.							
2.							
3.							
4.							

Section I--Burial Assets Exclusion Computation		Section III--Income Sources	$ Amount
1. Determine Net Burial Assets Exclusion Limit:		RSDI/RR Retirement	$
$	1A. Maximum Burial Assets Exclusion Limit	Cash Contributions	$
$	1B. Offset (Subtract value of irrevocable burial arrangements.)	Interest/Dividends/Rent	$
$	1C. Net Burial Assets Exclusion Limit (A-B)	VA Benefits	$
$	2A. Combined Value of Burial Assets (Revocable burial contracts, revocable trusts or other designated assets, e.g., bank accounts, etc.)	Earned Income	$
$	2B. Net Burial Assets Exclusion Limit (1C)	Other	$
$	2C. Excluded Burial Assets (If 2A equals or exceeds 2B, enter 2B amount here. If 2A is less than 2B, enter 2A amount here.)	**If determining eligibility for a child(ren) living with his/her parent(s), complete the monthly deeming and allocation section on the back before going to Section IV.**	
Enter 2C amount in Section II, Line 14 below.		**Section IV--Determination of Eligibility**	**Amount**

Section II--Countable Resources Computation	Value		Amount
1. Automobile, Truck, etc.	$	1. Gross Unearned	$
2. Life Insurance	$	2. General Disregard	$
3. Cash on Hand	$	3. Subtotal (1 - 2)	$
4. Checking Account	$	4. Gross Earned	$
5. Saving(s) Account	$	5. Disregards	$
6. U. S. Savings Bonds	$	a. General SSI Disregard	$
7. Stocks and Bonds	$	(Allow amount not used in 2)	$
8. Trust Fund	$	b. Subtotal (4 - 5A)	$
9. Pre-need Burial Contract (Revocable)	$	c. Earned Income Disregard ($65)	$ 65.00
10. Non-Excluded Cemetery Lot(s)	$	d. Subtotal (5B - 5C)	$
11. Real Property	$	e. Disregard ½ amount in 5D	$
12. Other	$	f. Subtotal (5D - 5E)	$
13. Countable Resources Subtotal (1 through 12)	$	6. Total (3 + 5F)	$
14. Less Burial Exclusion	$	7. Allocation (Section V, Line 2, if no eligible child)	$
Total Countable Resource Value (13 - 14)	$	8. Countable Income (6 - 7)	$
Resource Limit	$	9. Appropriate Poverty Level	$
		If Line 8 is greater than Line 9, Individual(s) is/are not eligible for ABD/QMB/SLMB.	

		Case Disposition	☐ Approved
		☐ Continued Eligible	☐ Denied
Eligibility Worker's Signature	**Decision Date**	**Date of Eligibility:_____**	☐ Closed

Section V--Monthly Allocation and Deeming Worksheet (Parent to Child)
Part I--Allocation Section

1. Parent's Unearned Income	$
2. Subtract Total Allocation for Ineligible Children	

Child	1	2	3	4
Allocation	$	$	$	$
Less Child's Income	$	$	$	$
Less Total Allocation	$	$	$	$

	$
(If no eligible child, enter this amount on Line 7, Section IV)	
3. Remaining Unearned Income (1-2)	
4. Parent's Earned Income	
5. Subtract Unused Portion of Allocation for Ineligible Children (In Line 2)	-
6. Remaining Earned Income (4-5)	

Part II--Deeming Section **Income Remaining from Part I**		**Part III--Income Determination for Eligible Child**	
1. Remaining Unearned Income (Part 1, Line 3 amount)		1. Deemed Income	
2. General Income Exclusion		2. Add Individual's Own Unearned Income	
3. Countable Unearned Income (1-2)		3. Total Unearned Income (1 + 2)	
4. Remaining Earned Income (Part 1, Line 6 amount)		4. Subtract General Exclusion	
5. Balance of General Income Exclusion of Line 2		5. Total Countable Unearned Income	
6. Subtract Work Expense Exclusion	65.00	6. Child's Gross Earned Income	
7. Total Exclusions (5 + 6)		7. Balance of General Income Exclusion of Line 4	
8. Remainder (4 - 7)		8. Subtract Work Expense Exclusion	65.00
9. One Half of Remainder		9. Total Exclusions (7 + 8)	
10. Countable Earned Income (8 - 9)		10. Remainder (6 - 9)	
11. Total Countable Income (3 + 10)		11. One Half of Remainder	
12. Parent Allocation (Individual or Couple FBR)		12. Net Earned Income (10 - 11)	
13. Deemed Income (11 - 12)		13. Child's Plan for Self-Support Amount	
		14. Child-s Countable Earned Income (12 - 13)	
		Total Countable Income (5 + 14) (Enter this amount on Line 8, Section IV)	