

## MAIT Facility Worksheet

Case number: \_\_\_\_\_

Case name: \_\_\_\_\_

1. Central office/local office approval date \_\_\_\_\_
2. Execution date (date trust was signed and notarized) \_\_\_\_\_
3. Date trust was established (first day of the month in which income is used to fund the executed trust (effective date)) \_\_\_\_\_
4. Member's facility type \_\_\_\_\_
5. Charge for care (see 8-I, 125 Percent of the Statewide Average Charge for Care) \_\_\_\_\_
6. Gross income:

Income Source in the Trust	Gross Amount
<b>Total gross income</b>	

**Gross income:**  
 Do not list sources that are third party medical payments or that are not considered income, e.g., Veterans' A & A, nursing facility payments, and Veterans' UME.  
 VA reduced improved pension—Month of entry count pension as income in trust. Ongoing pension minus \$90 as income in trust.

7. Is member's adjusted gross income greater than 125% of the statewide average charge for care?

8. Months: \_\_\_\_\_

9. Division to community spouse?  Yes  No

10. Client participation:

Trust administration fee	
Personal needs allowance	
<b>Adjusted gross income</b>	
Spousal diversion	
Dependent diversion	
Unmet medical: medical insurance premium	
Unmet medical: Medicare Part D expenses	
Unmet medical: Medicare Part B	
Unmet medical: other	
<b>Client participation</b>	
Plus aid and attendance	
Plus nursing facility insurance payments	
<b>Maximum client participation</b>	

**Dependent diversion:**  
 See EM 8-I, Deduction for the Maintenance Needs of a Spouse and Dependents, for dependents that live with a CS.  
 See EM 8-I, Allowance for Other Dependents, for dependents that are children.

11. Vendor name: \_\_\_\_\_

Per diem: \_\_\_\_\_

<b>28 days maximum Medicaid rate</b>	
<b>29 days maximum Medicaid rate</b>	
<b>30 days maximum Medicaid rate</b>	
<b>31 days maximum Medicaid rate</b>	

CP cannot exceed per diem. See EM-I, If Client Participation Exceeds the Facility's Medicaid Rate.

## Community Spouse Diversion

List Community Spouse's Income Below	Gross Amount
<b>Total income for community spouse</b>	
<b>Maximum diversion amount</b>	
<b>Deficit</b>	

System Entries: BCW2			
"B" line:		"E" line:	
Unearn1 SR 1	Unearn2 SR2	Unearn1 SR1	
Soc Sec. B	all other \$ X	300% amt. S	
Deduct 1	Deduct2	P Ded N	P Ded P
	Unmet Med	90 month after entry	10.00 Admin. Fee + Spousal div.