INCOME ALLOWANCE DETERMINATION FORM

Applicant/Recipient Name ____________________________

Name of Spouse ____________________________

Case Number ____________________________

This form is to be used to determine the total amount of income received by a married couple and the amount of the community spouse and/or family member income allowance. List all of the couple’s countable income below. (Attach additional sheet if necessary)

SECTION I – INCOME

A. EARNED INCOME – List all earned income including self-employment income.

<table>
<thead>
<tr>
<th>Source</th>
<th>Wage Earner</th>
<th>Monthly Gross (or Adjusted Gross for Self-employment)</th>
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<tbody>
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<td>1.</td>
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<td>2.</td>
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B. UNEARNED INCOME – List all unearned income. Examples: alimony, unemployment income, royalties, dividends, rent, mortgage, sales contract income, military or VA benefit, retirement pension, worker’s compensation, etc. If income is received jointly, list both spouses’ names.

<table>
<thead>
<tr>
<th>Source</th>
<th>Spouse(s) Receiving Income</th>
<th>Monthly Gross</th>
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C. INCOME TOTALS – Total all earned and unearned income from page 1 and list below.

1. Income Received by Wife $ __________________
2. Income Received by Husband $ + __________________
3. Income Received Jointly $ + __________________
4. Total Income of Couple $ = __________________

If total income is less than or equal to $2,114 go to Section III. If total income is greater than $2,114 complete Section II first.

SECTION II – SHELTER EXPENSES
List monthly shelter expenses below for the community spouse and compute the excess shelter amount.

1. Rental Cost $ __________________
2. Mortgage Payment $ __________________
3. Property Taxes (if not included in item 2 above) $ __________________
4. Home Insurance (if not included in item 2 above) $ __________________
5. Other (Condominium/Cooperative charges) $ __________________

Add items 1 through 5 $ __________________
Subtract $ -277.20
$ __________________

SECTION III – COMMUNITY SPOUSE INCOME ALLOWANCE
The community spouse may retain up to $2,114 per month of the couple’s total income. The community spouse’s share can be increased by the amount of excess shelter expense calculated above. In any event, the maximum community spouse income allowance is $3160 per month.

Calculate the total amount of income which can be allocated to the community spouse.

1. $2,114 minimum allowance $ __________________
2. Total excess shelter (Line II-6) $ + __________________
3. Total allowable community spouse allowance $ = __________________
4. Community spouse’s gross income $ - __________________
5. Net community spouse income allowance which can be provided $ = __________________

SECTION IV – FAMILY INCOME ALLOWANCE
Each family member who lives with the community spouse can receive $705 per month of the income of the spouse in long term care as long as that member’s gross monthly income does not exceed $2,114. If the income is in excess of $2,114 no income allowance can be provided to that member. A family member is defined as a minor dependent child, dependent parent, or dependent brother or sister of either spouse.

List the dependent family members, type of dependency (minor child, disabled, etc.), and amount of gross income for each below.

<table>
<thead>
<tr>
<th>Name</th>
<th>Dependency</th>
<th>Amount of Gross Income</th>
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Total Qualifying Members __________________
Calculate the total amount of income which can be allocated to each family member.

1. Monthly income allowance per family member $705
2. Number of qualifying family members $x$
3. Total family allowance which can be provided $=

**SECTION V – SHARE OF INCOME FOR SPOUSE IN LONG-TERM CARE**

Calculate the institutionalized spouse’s share of the total non-exempt income.

1. Total income of the institutionalized spouse $
2. Income to be allocated to the community spouse $
3. Income to be allocated to other family members $
4. Institutionalized spouse’s share of total income $

**SECTION VI – TOTAL ALLOCATION**

Based on the total allowance amount(s) which can be provided as indicated above, the couple’s income will be allocated as follows:

1. Community spouse’s share of total income $
2. Spouse in long-term care share of total income $
3. Family member(s) share of total income $
4. Total income of couple $(Should be the same as Section I, Line C-4 above)$

Person Completing Form

Signature

Date Form Completed