



SSI DISREGARD WORKSHEET

(Independent Living and HCBS Only)

Case Name: _____

Case Number: _____

Instructions: Use this form to compute the SSI income disregard if the applicant(s)/recipient(s) has/have earned income. Only one disregard may be allowed for each assistance plan. Enter dates and amounts in the identifying information and complete either Section I, II, III as appropriate. Attach this form to the ES-3104.5, or the ES-3104.6, or the ES-3104.7.

	Month(s) Effective			
	_____	_____	_____	_____
	Mo./year	Mo./year	Mo./year	Mo./year
Earned Income (Gross or adjusted gross)	\$ _____	\$ _____	\$ _____	\$ _____
Unearned income (Gross)	\$ _____	\$ _____	\$ _____	\$ _____

SECTION I Complete this section if Earned Income is greater than \$65 and Unearned Income is greater than or equal to \$20.

a. Enter earned income	\$ _____	\$ _____	\$ _____	\$ _____
b. Divided by 2	÷ 2	÷ 2	÷ 2	÷ 2
c. Enter results (a ÷ b)	= \$ _____	= \$ _____	= \$ _____	= \$ _____
d. Add \$52.50	+ \$ 52.50	+ \$ 52.50	+ \$ 52.50	+ \$ 52.50
e. Equals Total Disregard (c + d) *	= \$ _____	= \$ _____	= \$ _____	= \$ _____

SECTION II Complete this section if Earned Income is less than or equal to \$65 and Unearned Income is any amount:

a. Enter earned income	\$ _____	\$ _____	\$ _____	\$ _____
b. Enter either unearned income or \$20, whichever is less.	+ \$ _____	+ \$ _____	+ \$ _____	+ \$ _____
c. Equals Total Disregard (a + b) *	= \$ _____	= \$ _____	= \$ _____	= \$ _____

SECTION III Complete this section if Earned Income is greater than \$65 and Unearned Income is less than \$20:

a. Enter earned income	\$ _____	\$ _____	\$ _____	\$ _____
b. Enter unearned income	+ \$ _____	+ \$ _____	+ \$ _____	+ \$ _____
c. Add \$85	+ \$ 85	+ \$ 85	+ \$ 85	+ \$ 85
d. Enter results (a + b + c)	= \$ _____	= \$ _____	= \$ _____	= \$ _____
e. Divided by 2	÷ 2	÷ 2	÷ 2	÷ 2
f. Equals Total Disregard (d ÷ 2e) *	= \$ _____	= \$ _____	= \$ _____	= \$ _____

* Enter on Line 10 of ES-3104.5, Line 11 of ES-3104.6, or Line 10 of ES-3104.7

	Initial/date	Initial/date	Initial/date	Initial/date

Instructions for Completion of the ES-3103.5

Enter the case name and case number at the top of the form in the appropriate fields for identifying purposes.

Enter the month and year for each month being calculated.

In the Earned Income field, enter the following amount:

1. If using the ES-3104.5 form, enter the adjusted earned income amount from line 4 of that form.
2. If using the ES-3104.6 form, enter the adjusted earned income amount from line 9 of that form.
3. If using the ES-3104.7 form, enter the adjusted earned income amount from line 4 of that form.

In the Unearned Income field, enter the following amount:

1. If using the ES-3104.5 form, enter the total gross unearned income amount from line 8 of that form.
2. If using the ES-3104.6 form, enter the total gross unearned income amount from line 6 of that form.
3. If using the ES-3104.7 form, enter the total gross unearned income amount from line 8 of that form.

Use only one of the following sections based on the amount of the earned and unearned income.

SECTION I (earned income is greater than \$65 and unearned income is greater than or equal to \$20)

1. Enter the earned income amount
2. Divide the earned income amount by 2.
3. Add \$52.50 to one-half of the earned income amount.
4. The total amount is the SSI disregard.

SECTION II (earned income is less than or equal to \$65 and unearned income is any amount)

1. Enter the earned income amount.
2. Enter the lesser of unearned income amount or \$20.
3. Add the earned income amount and the lesser of unearned income or \$20.
4. The total amount is the SSI disregard.

SECTION III (earned income is greater than \$65 and unearned income is less than \$20)

1. Enter the earned income amount.
2. Enter the unearned income amount.
3. Add the earned income amount, the unearned income amount, and \$85.
4. Divide the total amount by 2.
5. This is the SSI disregard.

Initial and date the form.

Enter the SSI disregard amount calculated on this form:

1. On line 10 of the ES-3104.5.
2. On line 11 of the ES-3104.6.
3. On line 10 of the ES-3104.7.