ES-3163 Rev. 05-11

KANSAS DEPARTMENT OF SOCIAL AND REHABILITATION SERVICES

INCOME ALLOWANCE DETERMINATION FORM

Applicant/Recipient Name					
Name of Spouse					
Cas	se Number				
am	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.)				
SE	CTION I - INCOME				
A.	. EARNED INCOME – List all earned income including self-employment income.				
	Source 1.	Wage Earner	Monthly Gross (or Adjusted Gross for Self-employment)		
B. UNEARNED INCOME – List all unearned income. Examples: alimony, unemployment insurance royalties, dividends, rent, mortgage, sales contract income, military or VA benefit, retirement pensic worker's compensation, etc. If income received jointly, list both spouses' names. Spouse(s) Receiving Monthly					
	Source	Income	Gross		
	1				
	2				
	3.				
	4.				
	_				
	6				
	8				

B. UNEARNED INCOME (CONTINUED)

9.				
10.				
C. INC	OME TOTALS – Total all earned and unearned income from page 1 a	nd 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 \$1,839 go to Section III. If total income is greater than \$1,839 complete Section II first. SECTION II – SHELTER EXPENSES List monthly shelter expenses below for spouse in community and compute the excess shelter				
\$ <mark>1,83</mark> SECTIO List moi	complete Section II first. ON II - SHELTER EXPENSES Inthly shelter expenses below for spouse in community and compute the	e excess shelter		
\$ <mark>1,83</mark>	complete Section II first. ON II - SHELTER EXPENSES Inthly shelter expenses below for spouse in community and compute the			
\$ <mark>1,83</mark> SECTIC List moi amount	complete Section II first. ON II – SHELTER EXPENSES Inthly shelter expenses below for spouse in community and compute the section. Rental Cost	\$		
\$1,83 SECTIO List moi amount 1.	complete Section II first. ON II – SHELTER EXPENSES Inthly shelter expenses below for spouse in community and compute the	\$		
\$1,83 SECTIO List more amount 1.	complete Section II first. ON II – SHELTER EXPENSES Inthly shelter expenses below for spouse in community and compute the section. Rental Cost Mortgage Payment	\$ \$		
\$1,83 SECTION List more amount 1. 2. 3.	Complete Section II first. DN II – SHELTER EXPENSES Inthly shelter expenses below for spouse in community and compute the section. Rental Cost Mortgage Payment Property Taxes (if not included in item 2 above)	\$ \$		
\$1,83 SECTION List more amount 1. 2. 3. 4.	Complete Section II first. ON II – SHELTER EXPENSES Inthly shelter expenses below for spouse in community and compute the section. Rental Cost Mortgage Payment Property Taxes (if not included in item 2 above) Home Insurance (if not included in item 2 above)	\$\$ \$\$		
\$1,83 SECTION List more amount 1. 2. 3. 4.	Complete Section II first. DN II – SHELTER EXPENSES Inthly shelter expenses below for spouse in community and compute the section. Rental Cost Mortgage Payment Property Taxes (if not included in item 2 above) Home Insurance (if not included in item 2 above) Other (Condominium/Cooperative charges)	\$		

SECTION III - COMMUNITY SPOUSE INCOME ALLOWANCE

The community spouse may retain up to \$1,839 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 \$2,739 per month.

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

1.	\$ <mark>1,839</mark> 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	\$	=
CTION IV – FAMILY INCOME ALLOWANCE			
h family member who lives with the community spouse can receive \$613 per month of the income			

SEC

of the spouse in long term care as long as that member's gross monthly income does not exceed \$1,839. If the income is in excess of \$1,839 no income allowance can be provided to that member. A family member is defined as a minor or 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.

<u>Name</u>	<u>Dependency</u>	Amount of Gross Income
Total Qualifying Members		

Page 4	
Calculate the total amount of income which can be allo	ocated to

	1.	Monthly income allowance per family member	\$_	=613
	2.	Number of qualifying family members	\$_	Х
	3.	Total family allowance which can be provided	\$_	+
SEC	CTIO	N 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	\$_	=
Bas	ed o	N VI – TOTAL ALLOCATION n the total allowance amount(s) which can be provided as indicated abwill be allocated as follows:	ove	, the couple's
	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 same as Section I, Line C-4 above)	\$_	=
Person Completing Form				
Sigr	natur	e		
Date	e Fo	rm Completed		

each family member.