

DEPARTMENT FOR CHILDREN AND FAMILIES

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.

Source	Wage Earner	Monthly Gross (or Adjusted Gross for Self-employment)
1.	_____	_____
2.	_____	_____

B. UNEARNED INCOME – List all unearned income. Examples: alimony, unemployment insurance, royalties, dividends, rent, mortgage, sales contract income, military or VA benefit, retirement pension, worker's compensation, etc. If income received jointly, list both spouses' names.

Source	Spouse(s) Receiving Income	Monthly Gross
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____
8.	_____	_____

B. UNEARNED INCOME (CONTINUED)

- 9. _____
- 10. _____

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 \$1,892 go to Section III. If total income is greater than \$1,892 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 \$ - 215 _____
- 6. Total Excess Shelter \$ = _____

SECTION III – COMMUNITY SPOUSE INCOME ALLOWANCE

The community spouse may retain up to \$1,892 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 \$2,841 per month.

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

1. \$1,892 minimum allowance	\$	
2. Total excess shelter (Line II-6)	\$	+ <hr style="width: 100%;"/>
3. Total allowable community spouse allowance	\$	= <hr style="width: 100%;"/>
4. Community spouse’s gross income	\$	– <hr style="width: 100%;"/>
5. Net community spouse income allowance which can be provided	\$	= <hr style="width: 100%;"/>

SECTION IV – FAMILY INCOME ALLOWANCE

Each family member who lives with the community spouse can receive \$631 per month of the income of the spouse in long term care as long as that member’s gross monthly income does not exceed \$1,892. If the income is in excess of \$1,892 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>	<u>Amount of Gross Income</u>
<hr style="width: 100%;"/>	<hr style="width: 100%;"/>	<hr style="width: 100%;"/>
<hr style="width: 100%;"/>	<hr style="width: 100%;"/>	<hr style="width: 100%;"/>
<hr style="width: 100%;"/>	<hr style="width: 100%;"/>	<hr style="width: 100%;"/>
<hr style="width: 100%;"/>	<hr style="width: 100%;"/>	<hr style="width: 100%;"/>
<hr style="width: 100%;"/>	<hr style="width: 100%;"/>	<hr style="width: 100%;"/>
 Total Qualifying Members	<hr style="width: 100%;"/>	

