WORK SHEET FOR TREATMENT OF INSTITUTIONALIZED SPOUSE'S INCOME

HCBS/PACE

INSTRUCTIONS	AMOUNT	Line
Minimum Basic Allowance	$1,839.00	A
Compute any Excess Shelter Allowance by calculating the actual shelter costs:		
House Payment/Rent	+	B
Required Maintenance Fee (i.e., Condo Fee)	+	C
Insurance (For shelter only)	+	D
Taxes (On property only)	+	E
Utilities (actual or $507, whichever is larger)	+	F
Total of Actual Shelter Cost (Lines B through F)	=	G
and Subtracting 30% of the Basic Allowance	–$552.00	H
Excess Shelter Allowance (if this result is less than Ø, enter Ø)	=	I
Exceptional circumstances are defined as "beyond the control of which would result in significant financial duress" to the community spouse. The amount of the expense is entered in Line J.	+	J
Total Amount of the MMMNA (Add together Lines A + I + J) (NOTE: The total amount must not exceed the maximum MMMNA, which is $2,841.00)	=	K
Subtract the Community Spouse's Gross Income (i.e., sources other than public assistance).	–	L
This results in the "Monthly Income Allowance (MIA)," the contribution for the community spouse's monthly income needs from the institutionalized spouse	=	M

IF PERSON'S INCOME IS MORE THAN $2094, A TRUST MUST BE ESTABLISHED!

Income of the Institutionalized Person (unearned and earned with 65 ½ deduction included.)		1
Subtract the Client Maintenance Allowance (300% of the current SSI maximum) from the gross income of the institutionalized person. $2094.00		2
Subtract Trust Fee, if applicable (cannot exceed $20)	–	3
Balance (Subtract Line 2 and Line 3 from Line 1)		4
Enter Monthly Income Allowance (MIA) – ***from Line M above***	–	5
Balance (Subtract Line 5 from Line 4) – ***FOR HCBS/ACF CASES IF THIS AMOUNT IS ZERO OR A NEGATIVE NUMBER STOP HERE OTHERWISE CONTINUE*** (additional allowances will be determined by the case management agency using the LTC – 106 form)	=	6
Subtract the Total Family Allowance (FORMULA: Basic Allowance – total dependents' income x .333)	–	7
Subtract Expenditures for Authorized Health Insurance Costs and "Special Medical Services" (for Institutional Spouse only). (THIS DEDUCTION WILL BE CALCULATED AND SUBTRACTED for HCBS clients in an ACF by the case management agency using the LTC-106)	–	8
Subtract Lines 7 and 8 from Line 6. This result is the amount that must remain in the trust and is not available to either spouse. (If result is Ø, enter Ø)	=	9