IM-SP-6 (EPC Rev. 02/06/2012)

SUMMARY SHEET FOR POST-ELIGIBILITY TREATMENT OF INSTITUTIONALIZED SPOUSE'S INCOME

Minimum Basic Allowance	$ 1,839.00	(1)
Compute any Excess Shelter Allowance by calculating the actual shelter costs:		
House Payment/Rent	+	(2)
Required Maintenance Fee	+	(3)
Insurance (homeowners / renters)	+	(4)
Taxes (On property only)	+	(5)
Utilities (actual or $507 whichever is larger)	+	(6)
Total of Actual Shelter Cost (lines 2 thru 6)	=	(7)
and subtracting 30% of the Basic Allowance	– **552.00**	(8)
Excess Shelter Allowance (if this result is less than 0, enter 0)	=	(9)
MMMNA equals the basic allowance plus any excess shelter allowance, and must not exceed the maximum MMMNA of $2,841.00.		
If there are "exceptional circumstances which would result in significant financial duress" to the community spouse, add an appropriate additional amount for the MMMNA	+	(10)
Total amount of the MMMNA (Line 1 + 9 + 10)	=	(11)
Subtract the Community **Spouse's** Own Income (i.e., sources other than public assistance) *use gross income*	–	(12)
This results in the "Monthly Income Allowance (MIA)," the contribution for the community spouse's monthly income needs	=	(13)

Income of the **Institutionalized Person**		
(use gross income unless allowing for open enrollment or taxes)		(14)
Minus the Appropriate Personal Needs Allowance	–	(15)
Minus Income Trust Maintenance Fee	–	(16)
Minus the Monthly Income Allowance for the Community Spouse (From Line 13)	–	(17)
Minus the total family Allowance	–	(18)
Minus Expenditures for Authorized Health Insurance Costs and "Special Medical Services"	–	(19)
Patient Payment to Nursing Home (if this result is less than 0, enter 0)	=	(20)