

SSI-Related (Children In Household) Medically Needy Spenddown Computation Worksheet

Case Name		Case Number	Retroactive Period	Certification Period
Eligible Spouse		Ineligible Spouse		
Income Source	Frequency	Income Source	Frequency	

To determine if ineligible spouse is a responsible relative:

	Month 1	Month 2	Month 3																																				
1. Child																																							
2. Needs of Child	_____	_____	_____																																				
3. Income of Child	- _____	- _____	- _____																																				
4. Unmet Needs of Child A	= _____	= _____	= _____																																				
5. Child																																							
6. Needs of Child	_____	_____	_____																																				
7. Income of Child	- _____	- _____	- _____																																				
8. Unmet Needs of Child B	= _____	= _____	= _____																																				
9. Child																																							
10. Needs of Child	_____	_____	_____																																				
11. Income of Child	- _____	- _____	- _____																																				
12. Unmet Needs of Child C	= _____	= _____	= _____																																				
13. Unearned income of ineligible spouse																																							
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14. Subtotal unearned income of ineligible spouse	_____	_____	_____																																				
15. Total of monthly unmet needs of children (lines 4 + 8 + 12)	- _____	- _____	- _____																																				
16. Net unearned income of ineligible spouse	= _____	= _____	= _____																																				

Month 1

Month 2

Month 3

17. Earned income of ineligible spouse

DATE	AMOUNT

DATE	AMOUNT

DATE	AMOUNT

18. Subtotal earned income of ineligible _____
19. Deduct remaining unmet needs of children from line 18 - _____
20. Net earned income of ineligible = _____
21. Total net income of ineligible spouse (line 16 + 20) _____
22. Compare line 21 to needs of ineligible spouse. Does line 21 exceed needs? Yes No
 If yes, ineligible spouse's income is deemed to eligible spouse.
 If no, ineligible spouse's income is not deemed to eligible spouse.

Determine spenddown of eligible spouse:

23. Unearned income of eligible spouse

DATE	AMOUNT

DATE	AMOUNT

DATE	AMOUNT

24. Subtotal of eligible spouse's unearned income _____
25. Enter line 16 if income is to be deemed to eligible spouse + _____
26. Subtotal unearned income = _____
27. \$20 general income exclusion - 20.00
28. Total countable unearned income = _____

	Month 1	Month 2	Month 3
29. Earned income of eligible spouse			
	DATE	DATE	DATE
	AMOUNT	AMOUNT	AMOUNT
30. Subtotal of eligible spouse's earned	0.00		
31. Enter line 20 if income is to be deemed to eligible spouse	+ 0.00		
32. Subtotal	= 0.00		
33. Deduct any remaining balance of the \$20 general income exclusion	- 0.00		
34. Subtotal	= 0.00		
35. Deduct \$65 work expense exclusion	- 65.00	- 65.00	- 65.00
36. Subtotal	= 0.00		
37. Deduct 1/2 of subtotal (line 36)	- 0.00		
38. Total countable earned income	= 0.00		
39. Total countable unearned and earned income (lines 28 + 38)			
40. Household size			
41. MNIL			
42. Insurance premiums			
43. Medicare premiums	+	+	+
44. Total insurance	=	=	=
45. Total income for period (line 39 for months of cert)			
46. Total MNIL for period (line 41 for months of cert)	-		
47. Spenddown	=		
48. Less total insurance (line 44 for months of cert)	-		
49. Final spenddown	=		
	Month 1	Month 2	Month 3
50. Poverty level percentage			

Worker	Date
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Calculate!