

SUPPLEMENTAL SECURITY INCOME (SSI) METHODOLOGY ADULT INCOME ELIGIBILITY WORK SHEET (Individual or couple, applicant with an ineligible spouse)

Case name	Case number
Applicant's name	

PART I. INELIGIBLE SPOUSE'S UNEARNED INCOME

1. Ineligible spouse's total unearned income—do not include if ineligible spouse is receiving public assistance (PA) income. \$ _____
2. Allocation for ineligible children (if no children, enter zero in Part 1.2.c.).
Do not include PA or eligible children or children applying for this program.

CHILD NUMBER 1	CHILD NUMBER 2	CHILD NUMBER 3	CHILD NUMBER 4
Name	Name	Name	Name
a. Standard SSI allocation (couple Federal Benefit Rate [FBR] minus individual FBR)			
b. Subtract child's income (evaluate for student deduction)	-	-	-

- c. Total allocation _____ + _____ + _____ + _____ = \$ _____
3. Remaining unearned income (subtract line I.2.c. from I.1.) \$ _____

PART II. INELIGIBLE SPOUSE'S EARNED INCOME

1. Ineligible spouse's gross earned income. \$ _____
2. Unused portion of allocation for ineligible child(ren) \$ _____
3. Remaining earned income (subtract II.2. from II.1.) \$ _____

PART III. INELIGIBLE SPOUSE'S TOTAL INCOME AFTER ALLOCATIONS (Add I.3. and II.3.)

If less than the standard SSI allocation (the difference between the FBR for a couple and the FBR for an individual) deeming not applicable. Make no entry for ineligible spouse's income in Part IV. \$ _____

PART IV. COMBINED INCOMES (Eligible individual or couple and/or ineligible spouse after ineligible child allocations)

Unearned Income

1. Applicant's gross unearned income. \$ _____
2. Ineligible spouse's unearned income (line I.3.) \$ _____
3. Combined unearned income (add lines IV.1. and IV.2.) \$ + _____
4. Subtract general income exclusion \$ - 20 _____
5. Combined countable unearned income. \$ _____

Total Unearned

Earned Income

6. Earned income of applicant and spouse (use amount from line II.3. for ineligible spouse) \$ _____
7. Subtract balance of general exclusion not offset by unearned income (line IV.4.) \$ _____
8. Remaining earned income \$ _____
9. Subtract work expense exclusion \$ - 65 _____
10. Remaining earned income \$ _____
11. Subtract 1/2 remaining income \$ - _____
12. Subtract the disabled/blind individual's impairment-related work expenses/blind work expenses, if any \$ - _____
13. Countable earned income \$ _____
- Total Earned
14. Total countable income (add lines IV.5. and IV.13.) \$ _____
- Combined Total

PART V. SSI ELIGIBILITY CALCULATION

1. Current SSI/SSP income standard for an individual or a couple \$ _____
2. Enter total countable income (line IV.14.) \$ _____

If line V.2 is less than or equal to V.1., the applicant is SSI income eligible.

Eligibility Worker signature	Worker number	Computation date	County use only
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INSTRUCTIONS
SUPPLEMENTAL SECURITY INCOME (SSI) METHODOLOGY ADULT
ELIGIBILITY WORK SHEET MC 326 A
(Individual or couple, applicant with an ineligible spouse)

PART I. INELIGIBLE SPOUSE'S UNEARNED INCOME

Do not include ineligible spouse's income if he/she receives any public assistance (PA).

- Line I.1.** Enter the ineligible spouse's unearned income.
- Line I.2.** (If there are no children, enter zero on line 2.c.) Enter each ineligible child's first name in boxes provided on line 2.a., enter the standard SSI allocation for any ineligible child(ren) not on PA or applying for or eligible for this program. On line 2.b., enter any income for each of the children excluding \$400 per month, up to \$1,260 per year of student income. On line 2.c., enter the remainder for each child and total the allocation for each child.
- Line I.3.** Subtract line I.2.c. from line I.1. (unearned income) and enter the difference. This is the remaining unearned income amount unless the allocation amount (line I.2.c.) exceeds line I.1. (countable unearned income). In the latter case, the negative figure on line I.3. is carried over to line II.2. (unused portion of allocation).

PART II. INELIGIBLE SPOUSE'S EARNED INCOME

- Line II.1.** Enter the ineligible spouse's gross earned income.
- Line II.2.** Enter the amount of any allocation for ineligible children that is not offset by countable unearned income (line I.2.c. minus line I.3.). If line I.1. is equal to or greater than line I.2.c., enter zero in line II.2.
- Line II.3.** Subtract the allocation amount on line II.2. from line II.1. (gross earned income) and enter the difference.

PART III. INELIGIBLE SPOUSE'S TOTAL INCOME AFTER ALLOCATIONS

Add the amounts in lines I.3. and II.3. to determine the total income after allocations.

NOTE: If, at this point (after the allocation for ineligible children), the total earned and unearned income amount is less than the standard SSI allocation (the difference between the Federal Benefits Rate [FBR] for a couple and the FBR for an individual), there is no income available for deeming to the applicant. In this case, use only the applicant's income in Part IV and the current SSI/SSP payment level for an individual in Part V. If there is combined earned and/or unearned income remaining in excess of the standard SSI allocation, use the amounts from lines I.3. and II.3. in Part IV and the current SSI/SSP payment level for a couple in Part V.

PART IV. COMBINED INCOME

- Line IV.1.** Enter the applicant's or potentially eligible couple's unearned income.
- Line IV.2.** Enter the ineligible spouse's unearned income from line I.3. unless there is no deeming according to Part III.
- Line IV.3.** Enter combined unearned income of applicant(s) (line IV.1.) and/or ineligible spouse (line IV.2.).
- Line IV.4.** Enter the \$20 any income exclusion.
- Line IV.5.** Subtract line IV.4. from IV.3. and enter the difference. (If line IV.3. is less than \$20, enter zero in line IV.5.)
- Line IV.6.** Enter combined earned income of the ineligible spouse (unless there is no deeming from the ineligible spouse according to Part IV.) and the applicant(s). Use line II.3. for ineligible spouse's income. If there is no deeming, enter only the applicant's earned income.
- Line IV.7.** Enter unused portion of the \$20 any income exclusion not offset by unearned income.
- Line IV.8.** Subtract line IV.7. from IV.6. and enter the difference.
- Line IV.9.** \$65 work expense exclusion.
- Line IV.10.** Subtract line IV.9. from IV.8. and enter the difference.
- Line IV.11.** Enter half of the amount of line IV.10.
- Line IV.12.** Subtract line IV.12. from line IV.11.
- Line IV.13.** Subtract line IV.11. from line IV.10. and enter the difference.
- Line IV.14.** Add line IV.5. and IV.13. and enter total. This is the amount of income to be considered in determining SSI eligibility. Enter on line V.2.

Do not allow deductions for other health insurance premiums.

PART V. SSI ELIGIBILITY CALCULATION

- Line V.1.** Enter the current, applicable SSI/SSP payment level. If income is deemed from the ineligible spouse, use the SSI/SSP payment level for a couple. Otherwise use the SSI/SSP payment level for an individual.
- Line V.2.** Enter total countable income from line IV.14.

If line V.2. (total countable income) is less than or equal to the current SSI/SSP payment level, the applicant(s) is/are income eligible for this program.

In a situation where there is a potentially eligible child and parent with an ineligible spouse, first determine the eligible parent's SSI income eligibility using this work sheet. If the parent is eligible, determine the child's financial eligibility using only the eligible child's countable income.