

MONTHLY MAINTENANCE NEEDS ALLOWANCE WORKSHEET

Below is an explanation of how the Division determines the monthly income allowance for a spouse or family.

SECTION I: CALCULATION OF THE MINIMUM MONTHLY MAINTENANCE NEEDS ALLOWANCE (MMMNA) FOR THE COMMUNITY SPOUSE

Shelter Expenses for Community Spouse's Principal Place of Residence

| | | |
|--------------------------------------------------------------|-------------|-------------------------------------------------------------------------------------------------|
| Rent or Mortgage | \$ 0.00 | |
| Property Taxes and Insurance | \$ 0.00 | |
| Required Maintenance charge for a Condominium or Cooperative | \$ 0.00 | |
| Standard Deduction for Utility Expenses* | +\$ 634.00 | |
| TOTAL Shelter Expenses | =\$ 634.00 | |
| Subtract Standard Shelter Expense* | -\$ 598.00 | |
| Excess Shelter Amount | =\$ 36.00 | (Enter zero if total shelter expense are less than the federal standard maintenance allowance.) |
| Add Federal Standard Maintenance Allowance* | +\$ 1992.00 | |

MMMNA for Community Spouse 2980.50 =\$ 2028.00
[May not exceed established maximum* except following a fair hearing in accordance with 130 CMR 520.017 (D).]

SECTION II: CALCULATION OF THE SPOUSAL MAINTENANCE NEEDS ALLOWANCE (SMNA) FOR THE COMMUNITY SPOUSE

Gross Monthly Income of Community Spouse

| | |
|---------------------------------------|------------|
| Pension(s) | \$ 0.00 |
| Social Security/RSDI Benefits | \$ 1593.90 |
| Income from Spousal Assets | \$ 0.00 |
| Other Income (Trusts, Earnings, etc.) | \$ 0.00 |

Subtract TOTAL Gross Income of community Spouse from MMMNA for Community Spouse (in Section I) -\$ 1593.90

Additional Monthly Income Need of Community Spouse (SMNA) =\$ 434.10

SECTION III: CALCULATION OF THE FAMILY MAINTENANCE NEEDS ALLOWANCE (FMNA) FOR CERTAIN FAMILY MEMBERS LIVING WITH THE COMMUNITY SPOUSE [Show a separate calculation specific to each family member (excluding the community spouse).]

| | | | |
|-------------------------------------------------------------------------------------|---------|---------|------|
| Federal Standard Maintenance Allowance* | 1992.00 | \$ | 0.00 |
| Subtract Gross Monthly Income of Family Member | | -\$ | 0.00 |
| Divide Difference by 3 | | div 3\$ | 0.00 |
| <u>Monthly Income Need of Family Member Living with the Community Spouse (FMNA)</u> | | =\$ | 0.00 |

SECTION IV: CALCULATION OF INCOME AND PATIENT-PAID AMOUNT (PPA) OF INSTITUTIONALIZED SPOUSE

Monthly Income of Institutionalized Spouse

| | | | |
|--------------------------------------------------------------------------------|-----|---------|--------------------|
| Social Security/RSDI Benefits (Net) | \$ | 1021.00 | |
| Pension(s) (Gross) | \$ | 1235.08 | |
| Other (Gross) | \$ | 0.00 | |
| TOTAL Income of Institutionalized Spouse | | | =\$ 2256.08 |
| <u>Deductions Allowed from Income of institutionalized Spouse</u> | | | |
| Personal Needs Allowance (PNA)** | \$ | 72.80 | |
| SMNA | \$ | 434.10 | |
| FMNA | \$ | 0.00 | |
| Health-Care Coverage (other than Medicare) or Other Incurred Expenses | +\$ | 47.50 | |
| Subtract TOTAL Deductions from TOTAL Income of Institutionalized Spouse | | | -\$ 554.40 |
| Institutionalized Spouse's PPA | | | =\$ 1701.68 |

*This amount is established by federal law.

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