

Monthly Income Allowance (MIA) Computation Worksheet

Case Number	Mailing Date
Institutionalized Spouse's Name	Community Spouse's Name
Nursing Facility	Street Address (Community Spouse)
County	City, State, Zip Code (Community Spouse)
(A) Minimum Monthly Maintenance Needs Allowance (MMMNA) \$ _____	(B) Minimum Monthly Maintenance Needs Allowance (MMMNA) Cap \$ _____

Step 1. Institutionalized Spouse's Income

- | | |
|--|------------|
| a) Institutionalized spouse's gross countable income | \$ _____ |
| b) Subtract the appropriate personal needs allowance (PNA) | - \$ _____ |
| c) Subtract up to \$65 of earned income, if applicable | - \$ _____ |
| d) Available income | = \$ _____ |

Step 2. Shelter Costs

- | | |
|---|-------------------|
| a) Rent/Mortgage payment | \$ _____ |
| b) Add property taxes and insurance (if not included in mortgage payment) | + \$ _____ |
| c) Add condominium/cooperative maintenance fees, if applicable | + \$ _____ |
| d) Add the standard utility allowance | + \$ _____ |
| e) Total shelter costs (round down to nearest dollar) | = \$ _____ |
| f) Subtract the excess shelter allowance standard | - \$ _____ |
| g) Excess shelter costs | = \$ _____ |

Step 3. Monthly Income Allowance Budgeting

- | | |
|---|-------------------|
| a) MMMNA standard from (A) | \$ _____ |
| b) Add excess shelter allowance from Step 2(g) | + \$ _____ |
| c) Total is the MMMNA | = \$ _____ |
| d) Court-ordered amount (if applicable) | \$ _____ |
| e) Enter the court-ordered amount from Step 3(d), if applicable.
If not, enter the lesser of the calculated MMMNA Step 3 (c) or MMMNA Cap from (B) | \$ _____ |
| f) Subtract the community spouse's total gross income including the amount generated from resources. | - \$ _____ |
| g) Monthly Income Allowance (calculated) | = \$ _____ |

Step 4. Monthly Income Allowance

1. If the institutionalized spouse's income in Step 1(d) is equal to or greater than the calculated Monthly Income Allowance in Step 3(g), the community spouse may keep up to the amount in Step 3(g). \$ _____
2. If the institutionalized spouse's income in Step 1(d) is less than the calculated Monthly Income Allowance in Step 3(g), the community spouse may keep up to the amount in Step 1(d). If there are excess resources (see JFS 04077), a reallocation of resources can be requested through a state hearing. \$ _____

Eligibility Worker	District/ID	Telephone Number