

# Packet #2

## EH/MSP Eligibility Screening Worksheet

### 1) Determine Unearned Income

#### Monthly Unearned Income:

Applicant

Spouse<sup>1</sup> (if applicable)

Gross Social Security:		
+ Pension:		
+ Retirement Distributions:		
+ Other Income:		
<b>= Gross Unearned Income:</b>		
– Other Health Insurance Premiums:		
<b>= Countable Individual Unearned Income:</b>		
<b>Total Unearned Income:</b> (Sum of Countable Individual Unearned Incomes)		

### 2) Determine Earned Income (i.e., employment income)

#### Monthly Earned Income:

Applicant

Spouse<sup>1</sup> (if applicable)

Earned Income:		
– \$65 Disregard:		
÷ 2:		
<b>= Countable Individual Earned Income:</b>		
<b>Total Earned Income:</b> (Sum of Countable Individual Earned Incomes)		

**Total Unearned Income:**

+

**Total Earned Income:**

=

**Total Monthly Income:**

### 3) Determine Assets (only required for individuals applying for Extra Help)

Applicant

Spouse<sup>1</sup> (if applicable)

Checking and/or Savings Accounts		
Stocks		
Bonds		
Mutual Funds		
Individual Retirement Accounts or Other Similar Investments		
Other Cash at Home or Anywhere Else		
Real Estate Properties Other than Primary Residence		
<b>Total Assets:</b>		

**Total Assets:**

#### 4) Determine Program Eligibility Based on Income and Assets

2014 New York Gross Monthly Income Limits			2014 New York Asset Limits	
Program	Individuals	Couples	Individuals	Couples
Partial Extra Help <sup>2</sup>	\$1,459	\$1,966	\$13,440	\$26,860
Full Extra Help <sup>2</sup>	\$1,313	\$1,770	\$8,660	\$13,750
QI	\$1,333	\$1,790	No Limit	No Limit
SLMB	\$1,187	\$1,593	No Limit	No Limit
QMB	\$993	\$1,331	No Limit	No Limit
Medicaid	\$809	\$1,192	\$14,550	\$21,450

#### 5) Fill Out Appropriate Application Form

Program	Application
<i>QI</i> <i>SLMB</i> <i>QMB</i>	DOH-4328 (Use this application if the client already has EH or an income disregard)
<i>Extra Help</i> → <i>MSP</i>	<a href="https://secure.ssa.gov/i1020/start">https://secure.ssa.gov/i1020/start</a>

#### Questions?

Contact us at the Medicare Rights Center (MRC):

[professional@medicarerights.org](mailto:professional@medicarerights.org)

<sup>1</sup>If living together under the same roof.

<sup>2</sup>Assets and income limits differ if the client has Medicaid.

## NOTES