



Income Eligibility

To receive stipend a volunteer may not have an annual income from all sources, after deducting allowable medical expenses, which exceeds the program's income eligibility guideline. Annual income is to be counted for the *past 12 months* for serving volunteers and is *projected* for the next 12 months for new applicants.

Name: _____ Primary Phone: _____ Birth Date: _____

Number in household: _____ Martial Status: Married Widow(er) Single Divorced

SOURCE OF INCOME IF MARRIED COMBINE BOTH INCOMES, IF LIVING IN SAME RESIDENCE	MONTHLY INCOME	YEARLY INCOME
Salary/Wages	\$ _____	\$ _____
Social Security Benefits	\$ _____	\$ _____
Supplemental Security Income (SSI)	\$ _____	\$ _____
Pension	\$ _____	\$ _____
Income from Annuities / Pension	\$ _____	\$ _____
Net Rental Income	\$ _____	\$ _____
Interest Received / Income from Stocks and Bonds	\$ _____	\$ _____
Alimony	\$ _____	\$ _____
Other: See back for list of countable income	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____
OUT-OF-POCKET MEDICAL EXPENSES	MONTHLY AND/OR ONE TIME MEDICAL	YEARLY MEDICAL
Health Insurance Costs	\$ _____	\$ _____
Prescription Medications	\$ _____	\$ _____
Eyeglasses / Contact Lenses / Hearing Aids / Dentures	\$ _____	\$ _____
Other: See back for allowable deductions	\$ _____	\$ _____
Up to 50% of the maximum qualifying amount can be deducted TOTAL	\$ _____	\$ _____

I certify that the information provided is correct and understand that falsification of information may result in my being deemed ineligible to receive a stipend as a Senior Companion.

Volunteer Signature _____
Date

Program Staff Signature _____
Date

OFFICE USE ONLY	
Total yearly income	\$ _____
Minus total allowable medical:	- _____
Total Yearly Adjusted Income:	\$ _____
Qualifying Income Level:	\$ _____

What is considered income for determining volunteer eligibility?

According to Section 2551.44 of the Senior Companion Program Regulations:

- (a) For determining eligibility, "income" refers to total cash or in-kind receipts before taxes from all sources including:
 - (1) Money, wages, and salaries before any deduction, but not including food or rent in lieu of wages;
 - (2) Receipts from self-employment for from a farm or business after deductions for business or farm expenses;
 - (3) Regular payments for public assistance, Social Security, Unemployment or Workers Compensation, strike benefits, training stipends, alimony, child support, and military family allotments, or other regular support from an absent family member or someone not living in the household;
 - (4) Government employee pensions, private pensions, and regular insurance or annuity payments; and
 - (5) Income from dividends, interest, net rents, royalties, or income from estates and trusts.
- (b) For eligibility purposes, income does not refer to the following money receipts:
 - (1) Any assets drawn down as withdrawals from a bank, sale of property, house or car, tax refunds, gifts, one-time insurance payments or compensation from injury.
 - (2) Non-cash income, such as the bonus value of food and fuel produced and consumed on farms and the imputed value of rent from owner-occupied farm or non-farm housing.
 - (3) Per capita payments from certain tribal trust settlements. The IRS provides more information on these settlements, including a list of eligible tribes.

What are allowable medical expenses that may be deducted from income?

According to the Senior Companion Program Regulations, Section 2551.43(c):

Allowable medical expenses are annual out-of-pocket medical expenses for health insurance premiums, health care services, and medications provided to the applicant, enrollee, or spouse which were not and will not be paid by Medicare, Medicaid, other insurance, or other third party pay or, and ***which do not exceed 50 percent of the applicable income guideline.***

Examples of allowable out-of-pocket medical expenses:

Health Insurance Costs:

Private Insurance, Medicare/Medicaid Premiums, Long Term Care Insurance premiums, Co-payments and Deductibles

Prescription Drugs:

Pharmacy Program Co-payments and Deductibles

Medical Bills for Dr. Visits:

Included, but not limited to: Medical Care, Dental Care, Vision Care

Other out-of-pocket Medical expenses:

One time medical expense; equipment (supplies for dentures, hearing aids, eyeglasses, wheelchairs, canes, etc.); Over the counter drugs and supplies (pain relievers, antacids, hearing aid batteries, vitamins, non-prescription eye glasses)