

SHIBA screening tool for MSP and Extra Help

Income is monthly, and before any taxes or other deductions, including any Medicare premiums

Gross UNEARNED* income: 1. \$ _____

(*Includes Social Security, SSDI, pensions, unemployment benefits, etc.)

Deduct \$20 (per household): 2. \$ _____

Subtotal A: (#1 minus #2) 3. \$ _____

Gross EARNED* income: 4. \$ _____

(*Includes wages, salary and income from self-employment, etc.)

Deduct \$65 work expense: 5. \$ _____

Subtotal earned income: (#4 minus #5) 6. \$ _____

One half of #6 subtotal earned income: 7. \$ _____

Subtotal B (#6 minus #7): 8. \$ _____

Countable total income (#3 plus #8) \$ _____

Estimate of TOTAL ASSETS:

Cash: \$ _____

Stocks: \$ _____

Bank accounts: \$ _____

IRA / 401K: \$ _____

Real estate: (NOT the home you live in) \$ _____

Certificates of deposit: \$ _____

Cars* \$ _____

Recreational vehicles: \$ _____

Savings bonds: \$ _____

TOTAL ASSETS: (Sum of all assets): \$ _____

This is a tool to help SHIBA Volunteers better screen clients for Medicare Savings Programs and Extra Help. DSHS or Social Security make the final eligibility determination. If clients seem close, encourage them to apply and report their full information about their income and assets. The calculations will be made by the proper agency.

***One car used for medical appointments is not counted**