

Special Assistance In-Home Program Economic Assessment Worksheet

Instructions

The Economic Assessment Worksheet is a tool to be used to determine resources available to meet the client's health and safety needs. It is used to assess any unmet financial needs that are required to assist the client to live safely in a community living setting. It also serves as a means to document what the SA/IH payment is to be used for and serves as an agreement between the client and SA/IH Program that the SA/IH funds will be used as indicated.

Section A: Income and Expenses (Page 1 and 2)

Monthly Income

- List all income available to the client. Income source could include:

Social Security	Salary/wages/earnings
SSI	Child support
Veteran's Benefits	Alimony
Dividends/interest	General Assistance (DSS)
Railroad Retirement	Tribal Income (prorate)
Pension, other retirement	On-going cash from others

For easy reference, these are also listed on page 2 of the Economic Assessment Worksheet. There may be other sources of income not listed.

- Other Benefits:
 - Rental Assistance including tenant-based rental assistance (TBRA)
 - Food and Nutrition Services (FNS) formerly food stamps
 - Energy Assistance (seasonal)
- List these under monthly income sources as these benefits help meet monthly essential expenses. **NOTE: The Food and Nutrition Service Benefit Program counts the SA/IH Payment in determining the amount of the FNS benefit. Contact the DSS IMC to determine the amount of FNS benefit.**
- Enter the total amount on Item J.1.

Monthly Expenses

This part of the assessment requires that the client is made aware that certain expenses are considered non-essential for the SA/IH program and cannot be counted toward the total amount of expenses that will be used to determine the SA/IH payment. Client may need to make choices to forgo certain expenses in order to have needs met to remain safely in the community.

There are columns for “essential expenses” and “non-essential expenses.” List items according to the category in which they belong. Examples of **essential** expenses include:
amount)

Rent	Laundry
Basic Utilities	Medical bills/prescriptions and co-pays
Food (consider if client has Food and Nutrition Services)	Essential insurance premiums (prorate)
Clothing (prorate to reasonable monthly	Transportation costs related to health and safety needs

Page 2 of the worksheet also provides examples of essential and non-essential expenses for reference.

- The client is allowed a \$66.00 per month Personal Needs Allowance (PNA) as are those individuals receiving SA in a licensed residential facility. The \$66.00 amount can be added in the essential column to account for any items or services the client wishes to purchase that are considered non-essential and may be listed in the non-essential column. This is referenced on Page 2 of the Economic Assessment Worksheet and will be entered on Page 4, Section J of the worksheet where the SA/IH payment is computed.

Unmet Financial Need

- These are items or services not accounted for in the essential expenses column that the client needs for health and safety. This might include one-time expenses, short-term needs or a new service to which the client has not yet had access, but is an essential need. This might be a deposit for housing or electrical, or other services such as additional in home aide hours.
- List the item and the amount on Page 1. If it is a one-time or short-term expense, the SA/IH payment amount will need to be adjusted. Document this on Page 4 of the Economic Assessment Worksheet in the SA/IH Payment Computation Section.

Section B: Medical Insurance Coverage (Page2)

- Gather information about the client’s access to medical coverage and cost to client, if any. Include this in the essential monthly expenses on Page I of the worksheet. Clients eligible for SA/IH must also be eligible for full Medicaid, but may have other health insurance coverage.

Section C: Other Resources (Page 3)

- Verify and document other resources available to the client. Explore how these resources can be used to meet unmet need. Document how they can be used or why they are not being used in Item G. on page 3 of the worksheet.

Sections D through I: Documentation of Other Economic Information (Page 3)

- Document other economic information as indicated. This information should be used to assist the client in accessing all resources available to him/her and will reveal any issues that require follow-up.

Section J: Computation of the SA/IH Payment (Page 4)

- The computation of the SA/IH payment is documented in this section. The DSS IMC will communicate the maximum payment amount. Base the authorized payment amount on any deficit identified when comparing essential monthly expenses to available income along with any other unmet financial need.

Section K: Special Assistance In-Home Plan (Page 5)

- Document the maximum authorized amount in the first line. Based on computation in Section J, enter the SA/IH authorized payment amount. Document the unmet need and monthly amounts that the SA/IH payment will be used for. Note that total cannot exceed maximum authorized amount. The SA/IH Payment cannot be used for:

Automobile Purchases
Alcohol/ Tobacco Products
Purchases for Others/Gifts
"Spending Money"
Costs associated with pet care

It is permissible for the client to use the personal needs allowance for some of these types of items.

*Questions regarding the appropriate use of the SA/IH payment should be directed to the NCDAAS Adult Services Listserv.

- Explain to the client that the SA/IH funds are to be use only for the items listed. Review these items with the client and obtain the client's signature. Inform the client that failure to use the SA/IH payments as indicated could result in reduction or termination of the SA/IH payment.
- The worker must also sign and date the worksheet upon completion of the assessment. The client should be given a copy of Section K.
- Changes to the SA/IH Payment prior to the annual economic reassessment will be documented here. The worker and client must date and initial these changes.