Appendix C.6 – Sample FGP-SCP Income Review Form

In order to receive a stipend, a Foster Grandparent or Senior Companion must be at least 55 years of age and cannot have an annual income from all sources, after deducting allowable medical expenses, which exceeds the program’s income eligibility guideline for the state in which he or she resides. Annual income is required to be counted for the *past 12 months* for volunteers currently serving, and estimated for the *upcoming 12 months* for new volunteers.

Name: ____________________________   Phone: (______) _____- _______     email:  _____________

Number in household: _____   □ New volunteer   □ Current volunteer

Marital Status: □ Married   □ Widow(er)   □ Single   □ Divorced   □ Legally Separated

*In all categories below list all sources of income for the volunteer applicant and spouse, if living in same residence.*

<table>
<thead>
<tr>
<th>Current Income from all sources of Applicant and Spouse, if living in same residence</th>
<th>A. Volunteer’s Monthly Income</th>
<th>B. Spouse’s Monthly Income</th>
<th>C. Total Monthly Income (A+B)</th>
<th>D. Total Annual Income (C x 12)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>x 12 mo.</td>
</tr>
<tr>
<td>SSI / SSDI</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>x 12 mo.</td>
</tr>
<tr>
<td>Pension</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>x 12 mo.</td>
</tr>
<tr>
<td>Interest/Dividends</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>x 12 mo.</td>
</tr>
<tr>
<td>Other: see back for list of other countable income</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>x 12 mo.</td>
</tr>
<tr>
<td><strong>COLUMN TOTALS</strong></td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>x 12 mo.</td>
</tr>
</tbody>
</table>

Allowable deductions for medical expenses, if any. Please note up to 50% of the maximized qualifying amount can be deducted. See reverse side for examples of allowable medical deductions.

<table>
<thead>
<tr>
<th>Allowable deductions for medical expenses</th>
<th>$________ per month</th>
<th>or $________ per year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Insurance Premiums</td>
<td>$________ per month</td>
<td>or $________ per year</td>
</tr>
<tr>
<td>Prescription Drugs</td>
<td>$________ per month</td>
<td>or $________ per year</td>
</tr>
<tr>
<td>Doctor visits/medical bills</td>
<td>$________ per month</td>
<td>or $________ per year</td>
</tr>
<tr>
<td>Other allowable medical costs</td>
<td>$________ per month</td>
<td>or $________ per year</td>
</tr>
<tr>
<td>(See back)</td>
<td>$________ Total per month</td>
<td>$________ Total per year</td>
</tr>
</tbody>
</table>

FOR OFFICE USE ONLY:

Total Household Annual Income: $ ____________

Minus total allowable medical expense deduction: –

Equals *Total Annual Qualifying Income*: $ ____________

I certify that the information furnished above is correct and understand that falsification of information may result in my being deemed ineligible to receive a stipend as a Foster Grandparent/Senior Companion. *I understand that a knowing and willful false statement on this form can be punished by a fine or imprisonment or both under Section 1001 of Title 18, U.S.C.*

_________________________        ______     _______________________________            _____
VOLUNTEER SIGNATURE                   DATE        REVIEWED BY SPONSOR STAFF                        DATE
What is considered income for determining volunteer eligibility?

According to Section 2552.44 of the FGP Regulations and 2551.44 of the SCP 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 or 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) Supplemental Nutrition Assistance Program (SNAP), formerly known as the Food Stamp Program.

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

According to the FGP Regulations, 2552.43(c) and SCP Regulations, 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 include but are not limited to:

Health Insurance Costs:
Private insurance, Medicare/Medicaid premiums, co-payments and deductibles, long term care insurance

Prescription Drugs:
Pharmacy program co-payments and deductibles

Medical Bills for Dr. Visits:
Included, but not limited to: medical care, dental care, vision care not covered by health insurance

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 not covered by health insurance: pain relievers, antacids, hearing aid batteries, vitamins, non-prescription eye glasses

When and where are the current income eligibility guidelines published?

CNCS publishes the annual income eligibility guidelines shortly after the issuance of the HHS Poverty Guidelines, usually in February or early March. When issued the income eligibility guidelines are posted at Senior Corps Resources under “Manage Senior Corps Grants.” The guidelines clarify that for eligibility purposes, income does not include the value of food stamps provided under the Food Stamp Act of 1977, as amended.

If you have questions or need further clarification on determining income eligibility, please contact your CNCS State Office.