



SSI Quick Eligibility Worksheet


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Unearned Income


- gross unearned income ¹
- _____ — unearned income exclusion  **A**
- **total countable unearned income**

Earned Income

- gross earned income
- _____ — student earned income exclusion ²
- **adjusted earned income**
- _____ — remaining unearned income exclusion ³
- **adjusted earned income**
- _____ — earned income exclusion
- **adjusted earned income**
- _____ — IRWE (impairment related work expenses)
- **adjusted earned income**
- _____ — 1/2 earned income exclusion
- **adjusted earned income** 
- _____ — BWE (blind work expenses) **B**
- **total countable earned income**

- total countable unearned income
- + _____ — total countable earned income
- total countable income
- _____ — **PASS** ⁴ 
- **total countable income** **C**

To calculate monthly SSI eligibility, subtract total countable income from the current federal SSI benefit rate ⁵:

- \$ 637.00 — FBR/ 2008
- _____ — total countable income **C** 

SSI eligibility

Apply only exclusions appropriate to individual's circumstances and income source. Eligibility should be recalculated for each month the income or income source varies.

¹ gross unearned income for SSDI or SSRI is before Medicare premiums for Part B are deducted.

² Student work exclusion = first \$1,550 in a month up to \$6,240 in a year for a student under age 22.

³ The first \$20 from most sources is excluded. Unearned income is deducted first, then any remainder is applied against earned income.

⁴ PASS can be excluded from both total earned and unearned income.

⁵ The simple SSI calculation formula is A+B = C; then the SSI eligibility amount is FBR-C.