



Household and Income Worksheet

Determine the Number of People in Your Household

Relationship	Include	Do Not Include	Number
Yourself			1
Your Spouse	<ul style="list-style-type: none"> - Include if you are legally married, regardless of sex. - Include if you are legally married, but living apart (for example, spouse is away on military duty, away at work, or away for some reason other than legally separated or divorced). 	<ul style="list-style-type: none"> - Do not include if you are legally separated or divorced. - You do not need to claim your spouse if you are a victim of domestic abuse, domestic violence, or spousal abandonment. 	
Child(ren)	<ul style="list-style-type: none"> - Include number of dependent children. - Include adopted or foster children living with you that you can claim as a dependent. - Include number of children with whom you share custody if you can claim them as a dependent. - Include children under the age of 21 that you take care of 	<ul style="list-style-type: none"> - Do not include if a child is a non-dependent. - Do not include if a child is unborn. 	
Other Dependents:	<ul style="list-style-type: none"> - Include the number of parents you claim as dependents. - Include the number of siblings and other relatives who you claim as dependents. 	<ul style="list-style-type: none"> - Do not include unmarried domestic partner. - Do not include roommates. 	
Total Household Members (add right column)			

Determine Your Household Income

This information is needed for everyone claimed in the household above

Income	Verification	Do Not Include	Amount
IRS Form 1040, 1040A, or 1040EZ from prior year	<ul style="list-style-type: none"> - Form 1040 - Line 22 - Form 1040A - Line 15 - Form 1040EZ - Line 6 		
If patient does not have their tax form, he/she can request a copy of the return transcript by calling the IRS at 1-800-829-1040 or online at : https://www.irs.gov/Individuals/Get-Transcript			
Wages, salaries, tips, etc.	<ul style="list-style-type: none"> - Prior 4 weeks' pay stubs from all jobs x 12 - Pay Frequency # of stubs - Weekly 4 - Bi-Weekly 2 - Semi-Monthly (1st & 15th) 2 - Self-Employed Prior year 1099's 	<ul style="list-style-type: none"> - Any information more than 2 months old 	
Alimony	<ul style="list-style-type: none"> - Most recent month's check stubs x 12 	<ul style="list-style-type: none"> - Any information more than 2 months old 	
Unemployment Compensation	<ul style="list-style-type: none"> - Most recent month's check stubs x 12 	<ul style="list-style-type: none"> - Any information more than 2 months old 	
Social Security Benefits	<ul style="list-style-type: none"> - Most recent month's check stubs x 12 	<ul style="list-style-type: none"> - Any information more than 2 months old 	
IRA or Retirement Plan Distributions	<ul style="list-style-type: none"> - Most recent month's check stubs x 12 	<ul style="list-style-type: none"> - Any information more than 2 months old 	
Interest, Dividends, Rental Income	<ul style="list-style-type: none"> - Most recent 1040 		
Business Income	<ul style="list-style-type: none"> - Most recent 1040 		
Capital Gains			
Other			
Total Income (add to the right)			