

**1. BASIC INFORMATION**

Date (mm/dd/yyyy)	Consumer First Name	Consumer Last Name	
Counselor	Case Number (6 digits)	Updated Worksheet?	
Has it been confirmed that this consumer receives SSI or SSDI benefits because of a disability?			
Will this consumer receive any of the services listed below as "Non-Exempt Services" in the next 12 months?			
Family Size	Family Adjusted Gross Income	Exclusion Amount	

**2. NON-EXEMPT SERVICES TO BE INCLUDED ON IPE (include estimated totals)**

Physical/Mental Restoration Services, including the dispensing fee for hearing aids
Tuition and initial registration fees for vocational, college, and university training
Maintenance other than diagnostic, Transportation other than diagnostic
Services, other than diagnostic, to members of an individual's family necessary to the adjustment or rehabilitation of the individual with a disability
Occupational licenses, tools, equipment, and initial stock, (including livestock) and supplies
Computer purchases for consumers
Other non-exempt goods and services which can reasonably be expected to benefit an eligible individual in terms of employment outcome
Total Estimated Cost for Vehicle or Property Changes
<b>Non-Exempt Cost for Vehicle or Property Changes</b>
Total Estimated Cost for Hearing Aids
<b>Non-Exempt Cost for Hearing Aids</b>
<b>TOTAL:</b>

### 3. DISABILITY AND OTHER RELATED EXPENSES

**NOTE:** You can deduct disability-related services and expenses that the consumer is already paying from their available income. These deductions must be for services that support the consumer's Individualized Plan for Employment (IPE).

Physical Restoration
Medical Devices & Equipment
Medical Supplies
Health Insurance Premiums, Copayments, and Deductibles
Mental Restoration Services
Transportation
Impairment-Related Work Expenses
Out-of-Pocket Self-Employment Funds
Cost of Vehicle to Be Modified
<b>TOTAL:</b>

### 4. AVAILABLE INCOME/COST SHARING CALCULATIONS

Total Cost of Non-Exempt Services
Available Income
Percentage of Consumer Participation in Service Cost
Annual Maximum Percentage of Adjusted Available Income
Consumer's Maximum Annual Contribution
<b>TOTAL ESTIMATED CONSUMER COST:</b>

### 5. EXCEPTION TO THE APPLICATION OF COST SHARING

**NOTE:** Exceptions to consumer cost sharing shall be made to the branch manager.