WARDS ACCOUNT
Spend-Down
Worksheet

When a client who receives SSI is approaching the $2,000 resource limit, the worker needs to try to spend down the WARDS account. This spend down must occur before the 1st of the month. Follow these steps to see if a spend-down is available.

WARDS Worker's Name: Date Worksheet Completed:

WARDS Client's Name: ______________________	Client ID#: ____________
Client SSN: last 4 digits	Client DOB:

STEP 1 Dates DCF was Payee: ____________ to ______________

STEP 2 Were service months missing from approved deposits? ☐ Yes ☐ No **STOP**

If yes, attach the Deposit Detail report and list the missing months (Month/Year) here:

____

STEP 3 Were there additional expenses involved with the missing months? ☐ Yes ☐ No **STOP**

If yes, attached the SCRIPTS expense report and list them (service ID#s/amounts) here:

____

STEP 4 Request a manual expense by completing this section and sending the completed form, with attachments, to the WARDS Accountant.

To WARDS Accountant: Please do a manual expense from this client's WARDS account. (see client info above.)

Payee:

Total Amount: $ _________

Reason: Reimbursement for cost of care (date/ServiceID/amount – list as many that apply):

For WARDS Accountant Use:

Request Recv'd:	Check #:	Date on Check:

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