

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: _____

