

**MISSOURI FIRST STEPS  
HOUSEHOLD SIZE AND OTHER INCOME WORKSHEET**



CHILD NAME	DATE OF BIRTH	HEAD OF HOUSEHOLD	DATE COMPLETED

This worksheet is used to assist in the collection and calculation of a family’s household size and estimated annual income when a federal tax return is not available.

The Service Coordinator completes the applicable sections below and transfers the household size and estimated annual income in Section 3 to the ***Financial Information for Family Cost Participation*** form.

**Section 1: Determining Household Size with Dependency Test**

**A – Qualifying Child.** The individual meets dependency requirements if his/her relationship to the Head of Household (HOH) meets all four of the following criteria:

- Relationship:** A child (whether by blood or adoption), stepchild, foster child, sibling or stepsibling.
- Residence:** The individual has the same primary residence as the HOH for more than half the year. Exceptions apply for children of divorced or separated parents, temporary absences, and for children who were born or passed away during the year.
- Age:** The individual is under the age of 19 at the end of the year (or under the age of 24 if a full-time student for at least five months of the year), or be permanently disabled at any time during the year.
- Support:** The individual did not provide more than half of his/her own support for the year.

**B – Qualifying Relative.** The individual meets dependency requirements if s/he is not a qualifying child and his/her relationship to the HOH meets all three of the following criteria:

- Relationship:** The individual must either live with the HOH all year as a member of the household (a person who is not actually related to the HOH may meet the requirements in this way), or be related to the HOH in one of the following ways: grandchild, son-in-law, daughter-in-law, brother, sister, half brother, half sister, stepbrother, stepsister, brother-in-law, sister-in-law, parent, stepfather, stepmother, father-in-law, mother-in-law, grandparent, and, if related by blood, aunt, uncle, niece, or nephew.  
For the purposes of this requirement, divorce or death does not change any relationship which was established by marriage (e.g., son-in-law, daughter-in-law).
- Gross Income:** The individual’s gross income for the year must be less than \$4,000.
- Support:** The HOH provides more than half of the person’s total support during the year.

## Section 2: Determining Other Income Information

### A – Paycheck Stubs.

- Employer: \_\_\_\_\_
- Start date with employer: \_\_\_\_ / \_\_\_\_ / \_\_\_\_
- Pay period: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ to \_\_\_\_ / \_\_\_\_ / \_\_\_\_
- Year-to-date gross amount: \$ \_\_\_\_\_
- Average monthly amount: \$ \_\_\_\_\_  
(divide year-to-date total by the number of months included)
- Approximate yearly paycheck amount: \$ \_\_\_\_\_  
(multiply monthly amount by 12)

### B – Other Income (Earned or Unearned).

- Source: \_\_\_\_\_
- Amount: \$ \_\_\_\_\_
- Frequency:  Weekly  Monthly  Annual  Other: \_\_\_\_\_
- Approximate yearly other income amount: \$ \_\_\_\_\_  
(calculate based on amount and frequency)

## Section 3: Calculating Household Size and Income

### A - Total Household Size.

$$\begin{array}{c} \text{_____} \\ \text{Adults} \end{array} + \begin{array}{c} \text{_____} \\ \text{Dependents} \end{array} = \begin{array}{c} \text{_____} \\ \text{Household Size} \end{array}$$

### B - Total Income.

$$\begin{array}{c} \text{_____} \\ \text{Approximate yearly} \\ \text{paycheck amount} \end{array} + \begin{array}{c} \text{_____} \\ \text{Approximate yearly} \\ \text{other income amount} \end{array} = \begin{array}{c} \text{_____} \\ \text{Estimated Annual Income} \end{array}$$