

Basic Training for Support Staff

Module 5: Income Eligibility – Part 2



Audio

Welcome to Basic Training for Support Staff, Module 5: Income Eligibility – Part 2.

Graphics

453249781

Interactions

None.

References

None.

Module Overview



By the end of Part 2, you will be able to:

- Assess income eligibility for WIC Program by comparing household size and current income to the Federal WIC Income Eligibility Guidelines
- List income sources that must be included as household income
- Identify income sources that are excluded from household income
- Describe acceptable proof of income documentation

Audio

In Module 5, Part 1 you learned how to determine if an applicant or participant meets WIC's adjunctive eligibility requirements, and what sources of documentation are accepted for each. Now, in Part 2, you'll learn how to assess for income eligibility when an applicant or participant is not adjunctively income eligible for WIC. This is accomplished by comparing the applicant's household size and gross household income to Federal WIC Income Eligibility Guidelines. In addition, you will learn what income sources must be included as household income and those income sources that would be excluded. Acceptable proof of income documentation will also be covered.

Graphics

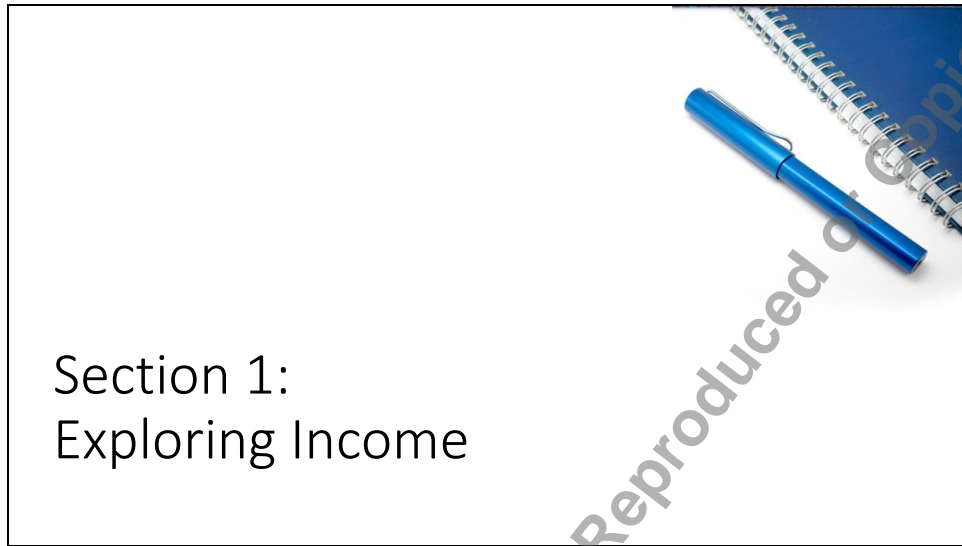
Display image of support staff meeting with applicants 498844696

Interactions

Sync text with audio.

References

None.



Audio

In Section 1, Exploring Income, you will look into how income is defined for WIC purposes and what sources of income are accepted to determine income eligibility. Let's get started!

Graphics

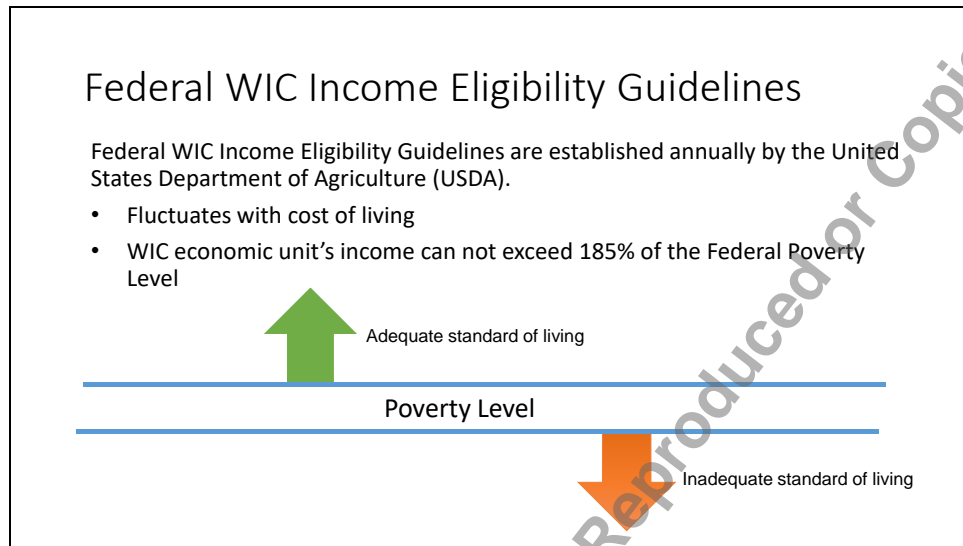
Use standard image of pencil and notebook.

Interactions

None.

Reference

None.



Audio

The Federal WIC Income Eligibility Guidelines are established annually by the United States Department of Agriculture, also known as USDA. These guidelines are based on 185% of the Federal Poverty Guidelines or Federal Poverty Level. The Federal Poverty Level is a level of income above which it is possible to attain an adequate standard of living and below which is not. The WIC Federal Income Eligibility Guidelines are established by the government and fluctuate with the cost of living. In order for individuals or economic units to qualify for WIC, their total income cannot exceed 185% of the federal poverty level based on household size.

Graphics

“The Federal WIC Income Eligibility Guidelines...”: display image of family drawing 515240078 Then, replace previous image and use standard shapes in Storyline to portray concepts as shown, colored to match prototype.

- “The Federal Poverty Level is”: wipe in Blue line (change colors to fit branding) & “Poverty Level” text
- “Above which it is possible...” add green arrow
- “Below which it is not...” add orange arrow
- “Household income cannot exceed...”: 185% text

Interactions

Sync text with audio.

Add References button and citation.

References

WPM Policy #1134 Federal Income Eligibility Guidelines

The current Federal WIC Income Eligibility Guidelines can be found at:

www.health.ny.gov/prevention/nutrition/wic/income_guidelines.htm

Property of NYS DOH / May Not be Reproduced or Copied

WIC Program's Definition of Income

- Gross cash income before deductions for income taxes, social security taxes, insurance premiums, bonds, etc. Other cash income includes cash amounts received/withdrawn from any source including savings, investments, trust accounts and other resources which are readily available

Ensure participants are aware of what counts as income and the required documentation



Audio

For WIC applicants who are not adjunctively income eligible, you must determine the income of the economic unit, or household. As you learned in Module 3, “The Economic Unit”, establishing the household is always the first step in the income assessment process. Once the household is established, you must determine if the applicant or participant’s household income meets WIC income eligibility requirements.

Federal regulations define income as gross cash income before deductions for income taxes, social security taxes, insurance premiums, bonds, etc. Other cash income includes, but is not limited to, cash amounts received or withdrawn from any source including savings, investments, trust accounts, and other resources which are readily available to the household.

As you can see, there are many sources that may be counted as household income. A critical part of your job is to make sure that your participants know the sources of income that they can use to prove their income eligibility and the documentation that is required. This should all be communicated prior to coming to their certification appointment.

Graphics

“For WIC applicants...” display image of support staff 485336724

“Federal regulations define...” display image portraying income 466981454

“A critical part of your job...” display image of support staff on phone 519093110

Interactions

Sync text with audio.

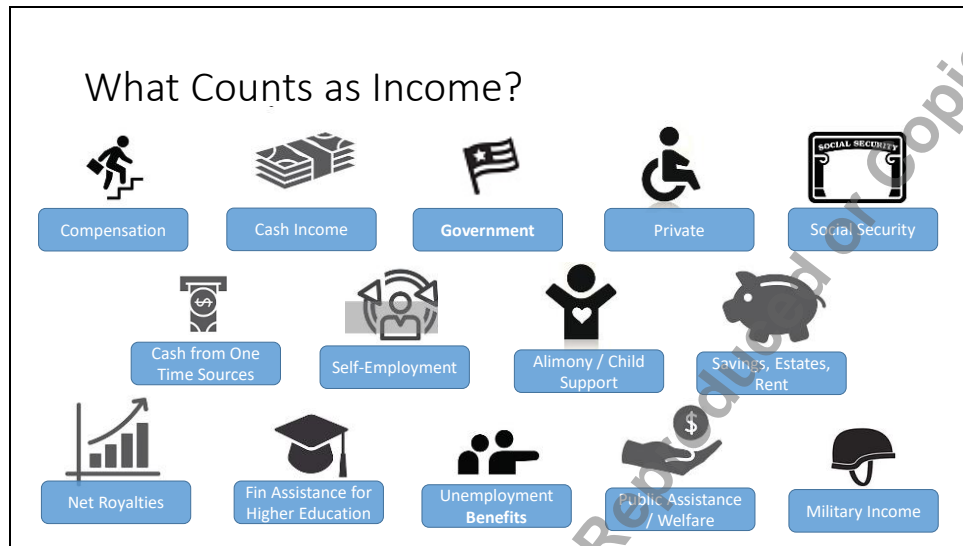
Add References button and citation.

References

WPM Policy #1130 Income Eligibility

Policy Supplement #1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied



Audio

Let's take a closer look at the sources of income that must be included. The following items should be counted as income.

- Monetary compensation for services, including wages, salary, commissions, tips and fees. Note that overtime counts as well.
- Cash income from any source that is readily available to the economic unit and is received or withdrawn for living expenses, such as savings, investments, trust accounts, and retirement accounts.
- Government civilian employee, or military retirement or pensions, or veterans' payments.
- Private disability payments, pensions, or annuities.
- Social Security benefits including disability (SSD) and Supplemental Security Income (SSI).
- Cash from one time sources that is used as income, such as: severance pay, gifts, inheritance, and lottery or gambling winnings. Also lump sum reimbursements such as: legal settlements, lost wages, punitive damages for insurance payments for pain and suffering, and Worker's Compensation. Please note that these one-time sources should be counted as annual income.
- Net income from farm and non-farm self-employment.
- Alimony or child support payments.
- Dividends or interest on savings or bonds, income from estates or trusts, or net rental income.
- Net royalties.
- Financial assistance for higher education that is provided for: room and board, dependent care expenses, and living expenses.
- Unemployment benefits.

- Public assistance or welfare payments
- Military income including basic pay, Basic Allowance for Subsistence (BAS), Contiguous United States Cost of Living Allowance (CONUS COLA), and other special and incentive pays and benefits, unless otherwise excluded.

Graphics

Display icons to represent each type of income. Recolor to match prototype. Icons are available from the following icon sets:

- Compensation, Unemployment Benefits: 471143792
- Cash Income, Cash from One Time Sources, Savings, Net Royalties, Public Assistance/Welfare: 500002672
- Government: 511801072
- Private, Alimony/Child Support: 159305338
- Social Security: 489137862
- Fin Assistance for Higher Education: 168737496
- Self-Employment: 493863040
- Military Income: 506063087

Note: icons on slide need to be arranged in a concise and aesthetically pleasing manner, not necessarily in any particular order.

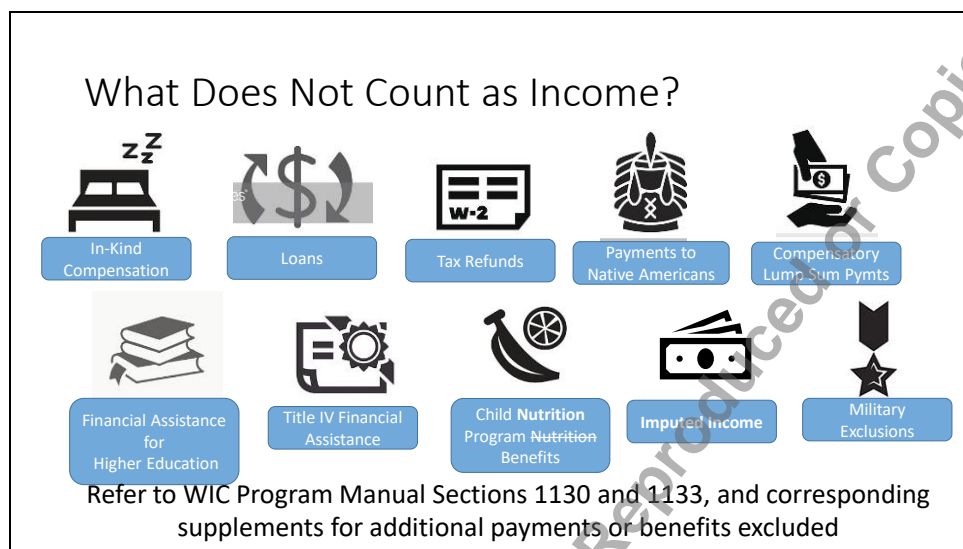
Interactions

Sync text with audio.

Add References button and citation.

References

WPM Policy # 1130 Income Eligibility



Audio

Now that we've discussed what income needs to be included, let's look at what income should be *excluded*. The following items should not be counted as income.

- Exclude in-kind housing and other in-kind compensation, including food or housing in lieu of wages.
- Exclude loans, not including amounts to which the applicant has constant or unlimited access.
- Exclude tax refunds.
- Exclude payments to Native Americans. Note, please refer to WIC Program Manual Section 1130 for a complete list of payments to Native Americans that should not be included as income.
- Exclude reimbursement for Compensatory Lump Sum Payments, such as for lost personal property or medical expenses, including amounts received from insurance companies or other sources for loss or damage of personal property, or payment for medical bills resulting from an accident or injury.
- Exclude grants and scholarships used towards higher education expenses such as tuition and fees, costs for purchase or rental of equipment, materials, or supplies required in the same course of study. Allowances for books, supplies, transportation and miscellaneous personal expenses for a student attending on at least a half time basis should also be excluded.
- Exclude financial assistance from any of the programs funded under title IV of the Higher Education Act of 1965, including: Pell Grant, Supplemental Educational Opportunity Grant, National Direct Student Loan, PLUS, College Work Study, and Byrd Honor Scholarship Programs.

- Exclude child nutrition program benefits as established under the National School Lunch Act of 1977 including: National School Lunch Act, Special Milk Program, School Breakfast Program, Child and Adult Care Food Program, Summer Food Service Program for Children, and the WIC Program.
- Exclude imputed income like domestic partner health insurance, group term taxable life insurance coverage over \$50,000, and non-deductible moving expense reimbursements.
- There are also several military exclusions. You'll review these on the next screen.

Please refer to WIC Program Manual Section 1130 policy supplement for additional miscellaneous payments or benefits provided under Federal Programs or Acts which are excluded by legislative prohibition.

Graphics

Display icons to represent each type of income. Recolor to match prototype. Icons are available from the following icon sets:

- In-Kind, Child Nutrition Program Benefits: 499903546
- Loans, Tax Refunds: 110873654
- Payments to Native Americans: 153070238
- Compensatory Lump Sum Pmts: 500002672
- Higher Education: 616855326
- Title IV Financial Assistance: 168737496
- Military Exclusions: 506063087

Note: icons on slide need to be arranged in a concise and aesthetically pleasing manner, not necessarily in any particular order.

Interactions

Sync text with audio.

Add References button and citation.

Reference

WPM Policy #1130 Income Eligibility

Policy Supplement #1130 Income Eligibility

WPM Policy #1133 Income Eligibility for Military Families

Policy Supplement #1133 Income Eligibility for Military Families

Military Inclusions

The following military inclusions must be counted as income:

- Basic pay
- Basic Allowance for Subsistence (BAS) or Subsistence Allowance (ALWS)
- Continental US Cost of Living Allowance (CONUS COLA)
- Other special and incentive pays and benefits, unless otherwise excluded

Audio

A Leave and Earnings Statement, also referred to as a LES is a document provided to those serving in the military. It is comparable to a pay stub and is provided on a monthly basis. Leave and Earnings Statements can sometimes be complicated to read. When determining income eligibility for military families, local agency staff must be aware of various types of military income and exclusions.

Audio

The following military inclusions must be counted as income:

- Basic pay,
- Basic Allowance for Subsistence (BAS) or Subsistence Allowance (ALWS)
- Continental United States Cost of Living Allowance (CONUS COLA), and
- Other special and incentive pays and benefits, unless otherwise excluded.

Reference

WPM Policy #1133 Income Eligibility for Military Families

Policy Supplement #1133 Income Eligibility for Military Families

Military Exclusions

The following military exclusions should not be included as income:

- Mandatory salary reduction amount used to fund the Veteran's Educational Assistance Act (GI Bill)
- Payments received under the Family Supplemental Subsistence Allowance (FSSA)
- Overseas and Outside the Contiguous United States Cost of Living Allowance (OCONUS COLA)
- Housing allowances (BAH, FSH and OHA)



Audio

There are several military exclusions that should not be included as household income. Do not count the following:

- The mandatory salary reduction amount for military service personnel which is used to fund the Veteran's Educational Assistance Act, or the GI Bill.
- Payments received by the armed forces and their families under the Family Supplemental Subsistence Allowance from the Department of Defense (FSSA).
- The Overseas and Outside the Continental United States Cost of Living Allowance (OCONUS COLA).
- Basic allowance for housing for US military personnel residing off military installations or in privatized housing, whether off or on base. This includes: Basic Allowance for Housing in the United States (BAH), Family Separation Housing provided to military personnel for separate dependent housing expenses due to military orders (FSH), or Overseas Housing Allowance provided to military personnel living overseas (OHA).

Graphics

"There are several military exclusions...": display image portraying military service 506063087

Interactions

Sync text with audio.

Replace onscreen text with second paragraph.

Add References button and citation.

Reference

WPM Policy #1133 Income Eligibility for Military Families

Policy Supplement #1133 Income Eligibility for Military Families

Property of NYS DOH / May Not be Reproduced or Copied

Combat Duty

- Combat Pay
- Foreign Duty Pay (FDP)
- Foreign Language Proficiency Pay (FLPP)
- Family Separation Allowance (FSA)
- Hostile Fire/Imminent Danger Pay (HFP/IDP)
- Other special and incentives pays

Must be excluded if service member is:

- received in addition to the service member's basic pay
- deployed to combat zone, and
- income was not received before deployment

Audio

Combat Pay received by US military personnel during deployment is excluded from WIC income calculations if it is:

- Received in addition to the service member's basic pay,
- Received as a result of the service member's deployment to or service in an area that has been designated as a combat zone AND *Not* received by the service member prior to his or her deployment to, or service in, an area that has been designated as a combat zone.

Audio

The following pays and incentives must be excluded if the service member is deployed to a combat zone and the income was not received before deployment:

- Combat Pay
- Foreign Duty Pay (FDP)
- Foreign Language Proficiency Pay (FLPP)
- Family Separation Allowance (FSA)
- Other special and incentives pays

For more detailed information regarding Military exclusions, please refer to Policy #1133 Income Eligibility for Military Families and the corresponding policy supplement.

Graphics

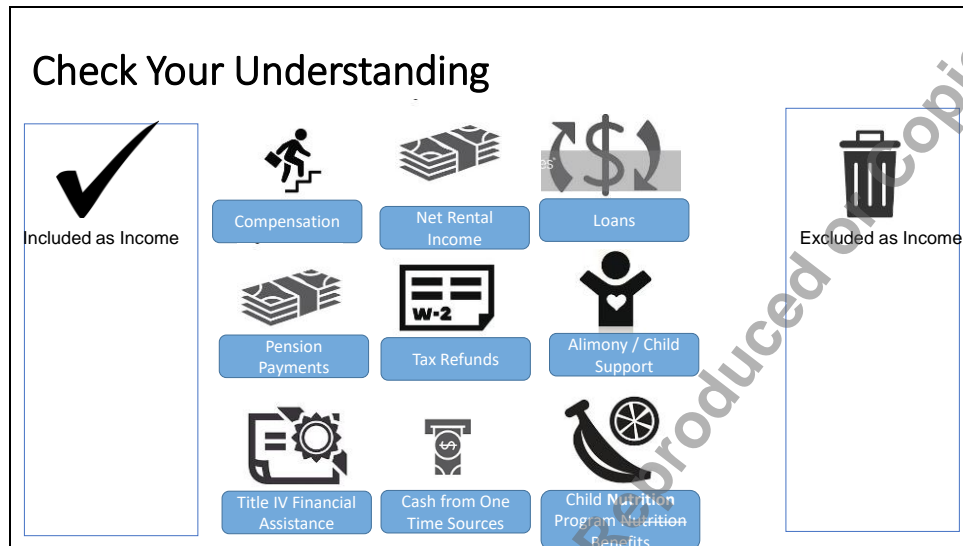
"Combat pay is excluded..." display image of soldier 571399039

Reference

WPM Policy # 1133 Income Eligibility for Military Families

Policy Supplement #1133 Income Eligibility for Military Families

Property of NYS DOH / May Not be Reproduced or Copied



Audio

Before we move on, let's practice identifying what counts as income when determining income eligibility, and what should be excluded. Drag the types of income to the correct category.

Audio (feedback)

Good job sorting the income.

Graphics

Display icons from previous screens as the basis of the interaction.

Display trashcan as the excluded landing area 646088246.

Display check mark as the included landing area.

Interactions

Create a drag and drop interaction allowing the learner to drag the icon/title groups to the categories. Only allow correct drops. Keep list of drops in the column, resizing if needed. Once all items are sorted, play feedback audio and display text, "Good job!"

Included:

Compensation

Net Rental Income

Pension Payments

Alimony/Child Support

Cash from One Time Sources

Excluded:

Loans

Tax Refunds

Title IV Financial Assistance

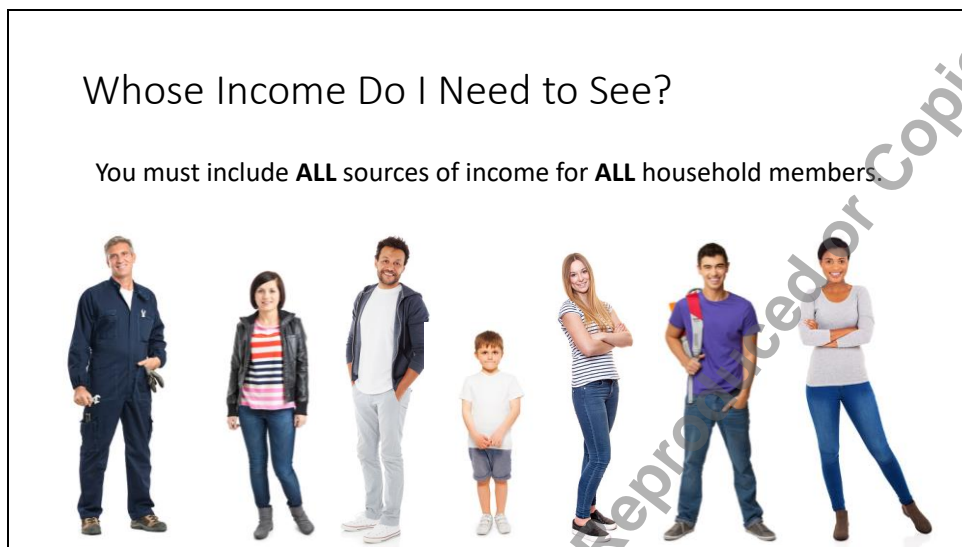
Child Nutrition Program Benefits

When you have additional questions regarding what to include and exclude as income, you may refer WIC Program Manual Section 1130 or contact your regional office.

References

WPM Policy #1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied



Audio

Now that you have learned what sources of income are included and what sources are excluded, the next question that must be answered is; whose income must be counted? The answer to this question is quite simple. You must include ALL sources of income for ALL members in the household or economic unit. This is why determining who is part of the economic unit is always the first step in the income assessment process. When you are talking to applicants over the phone, it is critical that they fully understand, that in addition to their own income, they must also bring proof of income for all members of their economic unit, on the day of certification.

Graphics

“Now that you have learned...”: display image of question mark 483812494

“You must include...” bring in pictures of people listed below (note: these are the same images from Module 3’s definition of economic unit)

- Husband: 512888435
- Wife: 508224278
- Child: 530578514
- Woman: 496739320
- Man: 518528603
- Younger Man: 175543089
- Younger Woman: 184910973

Interactions

Sync text with audio.

Add References button and citation.

References

WPM Policy #1130 Income Eligibility

Policy Supplement #1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied



Section 2: Determining Household Income

Audio

In Section 2, Determining Household Income, you will learn about the three different types of income and the various types of documents that may be accepted as proof when assessing for eligibility. Click next to begin.

Graphics

Use standard image of pencil and notebook.

Interactions





None.

Reference

None.

Three Types of Income

Which types of income best reflects the WIC household?

Current Income	Prospective Income	Annual Income
		
		

Click each participant to learn

Audio

When assessing household income, you will need to review all income sources, from each economic unit member who contributes money to the household. When doing this you will decide which type of income best reflects each household member's financial situation. Type of income refers to current income, prospective income, or annual income. Just as all WIC participants are unique, so are the circumstances in which they work and or get paid. Some may work steadily all year long; while others work seasonally or on a per diem basis. There are those whose pay checks are exactly the same each week; while others have pay that fluctuates. You must decide whether the household's financial situation is best represented by their current or prospective income, or annual income during the past twelve months. Take the time to talk with your applicants and participants to ensure that you have all of the necessary information that you need to decide which type of income to use.

Click on each participant to learn more about the types of pay he or she may receive and when they are used.

Audio (with click of Current Income)

Current income reflects income from the past 30 days and should be used for those who are:

- Regularly employed
- Currently receiving unemployment
- Currently receiving disability
- Laid off or
- On strike

Audio (with click of Prospective Income)

Prospective income reflects income for the next 30 days and may be used for those who have been determined eligible for or receiving:

- Unemployment or
- Disability

Audio (with click of Annual Income)

Annual income reflects income over the past 12 months and may be used for:

- Self-employed persons
- Farmers
- Those who are seasonally employed
- Migrants. Migrant workers are individuals whose principal employment is in agriculture on a seasonal basis. To learn more about migrant workers, please refer to WPM Policy #1011.
- Those who are on unpaid, temporary leave from work
- Persons who receive an annual salary but do not work a full calendar year such as a teacher
- Those who are regularly employed with irregular or intermittent overtime such as a nurse

Audio (final audio once all categories have been clicked)

Once you have gathered all of the facts, if you still have questions about what frequency to use, you can contact your Regional Office for guidance.

Graphics

“When assessing household income...”: display image portraying support staff 465250399

“Current income...” display image of African American woman holding up check (Stock photo ID:1150345121)

“Prospective income...” display image of money and handshake (Stock photo ID:1163981879)

“Annual income...” display image of year calendar (Stock photo ID:1184087844)

Interactions

Make the images of the participants buttons. Upon click, display under button text and play corresponding audio.

(with click of Current Income)

Income from the past 30 days

- Regularly employed
- Currently receiving unemployment
- Currently receiving disability
- Laid off
- On strike

(with click of Prospective Income)

Income for the next 30 days for those who are determined eligible for or receiving:

- Unemployment

- Disability

(with click of Annual Income)

Income over the past 12 months

- Self-employed persons and farmers
- Seasonally employed persons
- Migrants
- Unpaid temporary leave from work
- Receive an annual salary but do not work a full calendar year
- Regularly employed with irregular or intermittent overtime

Play final audio when all categories have been clicked.

Add References button and citation.


References

WPM Policy # 1130 Income Eligibility

Policy Supplement # 1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied

Paystubs



Applicants and participants must bring paystubs to correspond to their pay frequency:

- Weekly: 4 paystubs
- Bi-Weekly (every other week): 2 paystubs
- Twice-Monthly (2x month): 2 paystubs
- Monthly: 1 paystub

Make sure applicants/participants know how many paystubs to bring.

Click the paystub to take a closer look at what it must show.

Audio

Applicants and participants who are using paystubs to prove their income eligibility must bring them to their certification appointment. The number of paystubs you must see depends on their pay frequency. The income frequencies listed on the Federal WIC Income Eligibility Guidelines are weekly, bi-weekly, twice-monthly, monthly and annual. When participants are paid weekly, they must present four pay stubs at the income eligibility determination. A bi-weekly pay frequency means that they are paid every other week and are required to present two paystubs. When they are paid twice-monthly, two pay stubs must be presented as well. Last, is the monthly frequency. Applicants and participants who are paid on a monthly basis must bring one paystub. Please note that annual income will be discussed later in this section.

When you are preparing applicants and participants for a certification, make sure they are aware of the correct number of paystubs to bring according to their pay frequency. Keep in mind that originals, copies, faxes, and emails of paystubs are all acceptable, as well as online verification. Click the paystub to take a closer look at what it must show.

Audio (with click of paystub)

Paystubs and direct deposit stubs must list:

- To whom they were issued
- Dates from the last 30 days prior to the appointment
- Pay period covered
- Gross pay

Graphics

"Applicants and participants must bring...": display image of folder 182175433

"When you are preparing applicants...": display image of support staff on phone 185100892

"Keep in mind...": display image of paystub 613113806 and make it a button as the basis of the interaction.

Interactions

Sync text with audio.

Add References button and citation.

Allow learner to click paystub. Upon click, play corresponding audio and display this under button text:

Paystubs and direct deposit stubs must list:

- To whom they were issued
- Dates from the last 30 days prior to the appointment
- Pay period covered
- Gross pay


References

WPM Policy #1134 Federal Income Eligibility Guidelines

Policy Supplement #1130 Income Eligibility

Averaging Paystubs

\$109.10
\$76.54
\$106.78
+ \$120.97
<hr/>
\$413.39
÷ 4 = \$103.3 ⁺¹ 75
\$103.35



Audio

As noted previously, when participants provide paystubs with different pay amounts, you must calculate the average. To average, add all of the paystub amounts together and then divide by the total number of items. If the average does not round to the nearest cent, use the following procedure:

Locate the hundredths place, which is two digits to the right of the decimal point. Then look at the very next number to the right (which is in the thousandths place.) If the number in the thousandths place is 5 or above, the number in the hundredths place must be increased by 1 and all the numbers after it are dropped, if the number is 4 or below then do not increase the number in the hundredths place, leave it alone and just drop all of the numbers after it.

In this example, because the number in the thousandths place is 7, you will add one to the four – and then drop the rest of the numbers. The average pay is then \$103.35.

Graphics

“As noted previously...” float in images of four paystubs 533859960 with gross pay amounts shown on them.

“Add all of the paystubs together...” fade in equation

“Then divide by the total number of items...” fade in division and briefly highlight the paystubs to emphasize 4

“Locate the hundredths place...” highlight/recolor the hundredths position

“Then look at the very next number...” highlight/recolor the thousandths position

“We will add one to the four...” fade in +1 above the hundredths position
“The average pay is then...” reveal final answer

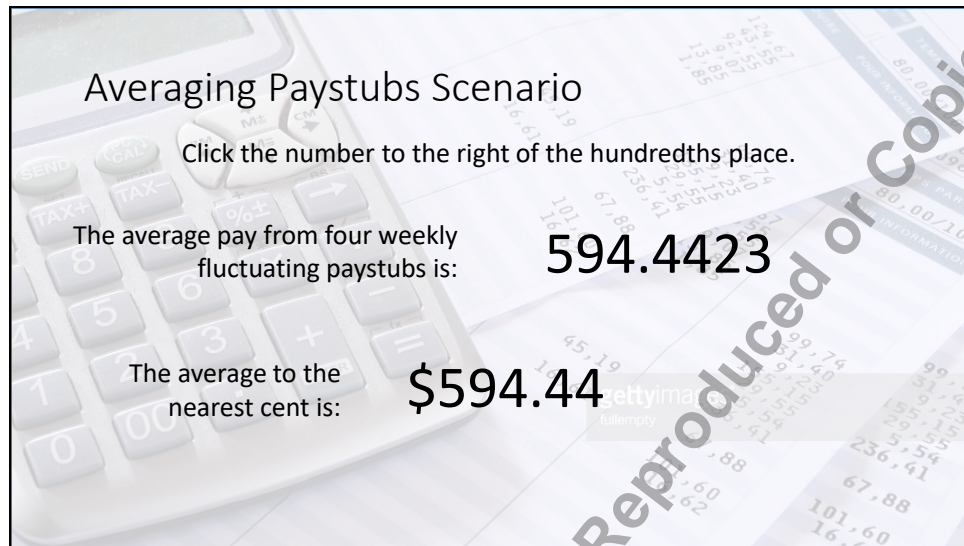
Interactions

Sync text with audio as noted above.

References

None.

Property of NYS DOH / May Not be Reproduced or Copied



Averaging Paystubs Scenario

Click the number to the right of the hundredths place.

The average pay from four weekly fluctuating paystubs is: 594.4423

The average to the nearest cent is: \$594.44

Audio

In another example, let's say you receive four weekly fluctuating paystubs, which together average 594.4423. Look at the number to the right of the hundredths place. Click on that number.

Audio (with incorrect click)
That's not correct. Try again.

Audio (with correct click)
Great. The number to the right of the hundredths place is 2. When the value in this position is 1, 2, 3, or 4, the number in the hundredths place stays the same, and you drop any other numbers to the right. So, the average rounded pay is \$594.44.

Graphics

Display image of calculator and paystubs 500390105 faded in background

Interactions

Sync text with audio.

Allow learner to click on the numbers. Play incorrect feedback until they get it right. Display rounded number with text upon click of correct number.

Correct answer: 2

References

None.

Property of NYS DOH / May Not be Reproduced or Copied

Averaging Paystubs

Click the number to the right of the hundredths place.

\$123.38
\$123.45
\$120.12
+ \$232.98
= \$599.93
÷ 4
= \$149.9825

Enter pay amount rounded to the nearest cent?

\$

Audio

Before we move on, let's check your understanding of rounding. For each of the equations, select the number that is to the right of the hundredths place. Then enter the pay amount averaged to the nearest cent and click Submit.

Graphics

Display image of calculator and paystubs 500390105 faded in background

Interactions

Show equations one at a time. Reveal textbox for users to write in the final rounded number only after they've correctly selected the number to the right of the hundredths place. Allow learner to click Submit button. After clicking submit, display number correctly rounded with text "The correct amount is:". Allow learner to click Continue button to see the next equation. After all items have been completed, add screen text prompt, "Good job practicing!"

Equation 1

\$ 123.38
\$ 123.45
\$ 120.12
+ \$ 232.98
= \$ 599.93
÷ 4
= \$ 149.9825

\$149.98

Equation 2

\$ 1,522.40

+ \$ 1,202.20

= \$ 2724.60

÷ 2

= \$ 1362.3000

\$ 1362.30

Equation 3

\$ 78.46

\$ 77.50

\$ 79.00

+ \$ 81.00

= \$ 315.96

÷ 4

= \$ 78.99

\$ 78.99

Equation 4

\$ 112.86

\$ 100.78

\$ 90.47

+ \$ 95.88

= \$ 399.99

÷ 4

= \$99.9975

\$ 100.00

Equation 5

\$ 678.99

+ \$ 650.12

= \$1,329.11

÷ 2

= \$664.555

\$664.56

References

None.

Written Statement from Employer

Written Statement must include:

- Date
- Employer name
- Employer address
- Employer telephone number
- Gross income amount (must be within the last 30 days)
- Frequency of payment
- Signature of authorized company representative

Statement does not have to be on company letterhead



Audio

In addition to paystubs, let's look at some other forms of proof for income that applicants and participants may provide.

A written statement from an employer is acceptable proof of income. However, you must examine the letter thoroughly to ensure its authenticity. In order for a written statement to be used as acceptable proof of income, it must include the following:

- Date
- Employer name
- Employer address
- Employer telephone number
- Gross income amount from the last 30 days
- Frequency of payment
- Signature of authorized company representative

Please note that the statement does not have to be on company letterhead.

Graphics

Display image portraying support staff MD000654 and image of letter head, placing bulleted items on it 181539088

Interactions

Sync text to audio.

Add References button and citation.

References

Policy Supplement #1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied

Income Tax Records



Who can use income tax records?

- Individuals who are self-employed or whose income is inconsistent on a regular basis

Income tax records:

- Must be from most recent filing
- Must show total income before adjustments (including all schedules)
- Child support, SSI and Social Security are not included on tax returns but must be counted

Refer to WPM 1130 Income Eligibility Policy Supplement to learn more

Audio

Individuals who are self-employed or whose income is inconsistent on a regular basis may use annual income in the form of Federal Income tax records that have been submitted to the IRS. Tax returns must be from the most recent filing and can be used until April 15th of the following tax return year. For example, the 2016 tax return can be used until April 15, 2018.

The return must show total income before adjustments (including all schedules). Keep in mind that child support, Supplemental Security, also referred to as SSI, and other Social Security benefits are not included on Income tax records but must be counted as household income.

If only one spouse is self-employed and the other spouse is steadily employed and is paid on a regular basis, then it will be necessary to review both Income tax records and current paystubs from the last 30 days. Local agency staff should also ask to see documentation that was filed with the Income tax in order to determine how much income came from the self-employed spouse. Keep in mind that current income for the spouse that is not self-employed must be used to verify his/her income.

Please refer to the WPM 1130 Income Eligibility Policy Supplement for further information regarding self-employment

Graphics

“Individuals who are self-employed...” display image of support staff 533345389

“The return must show...” display image of tax return 176775385

“If only one spouse is self-employed...” display image of couple 490614153 (cropped)

Interactions

Sync text with audio.

Add References button and citation.

References

Policy Supplement #1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied

Self-Employment

Net income can only be used when self-employed:

- Review the revenue and expenses on IRS Schedule C (line 31), or C-EZ (line 3)
- If self-employment is the only source of income, ask probing questions to determine how living expenses are managed
- If spouse is steadily employed, verify current income
- Enter \$0.00 if net income is negative and write note with actual amount



Audio

WIC Federal Regulations specifically state that total gross income must be used when assessing for income eligibility. However, there is one exception to this rule. Self-employment is the one and only time that net income can be used. To assess farm or non-farm self-employment for net income, you must review the revenue and expenses on IRS Schedule C (line 31) from the Income tax return, or review the revenue and expenses on C-EZ (line 3). If salaries have been paid to WIC household members, those salaries must be counted as income for the economic unit.

If only one spouse is self-employed, while the other spouse is steadily employed, you must review both Income tax records and current income from the last 30 days. You should ask to see the documentation that was filed with the Income tax return in order to determine how much income came from the self-employed spouse.

Determining net income can sometimes be a challenging task. Use your best judgment and write a clear and concise note about how the determination was reached. If the net income is a negative amount, you will enter \$0.00 in the computer system. You must then write a note that includes the actual negative amount shown on the income tax record.

Graphics

“WIC Federal Regulations...” display image of support staff with participant 183763505

“When farm or non-farm self-employment...” display image of support staff with clipboard 514830379

Interactions

Sync text with audio.

Reference

None.

Property of NYS DOH / May Not be Reproduced or Copied

Verification of Certification

Participants transferring from out of state and in-stream migrant farmworkers may provide valid Verification of Certification (VOC) card:

- Migrant farmworkers may use valid VOC card as proof of income eligibility when income determination was made within last 12 months



Audio

Transferring participants and in-stream migrant farmworkers and their family members may provide a valid Verification of Certification, or VOC card as documentation of income eligibility. If the VOC card reflects that a migrant farmworker's certification period has expired, it may still serve as income documentation if it reflects that an income determination was made within the past 12 months. Verification of Certification will be explained in more detail in Module 6, Special Situations During Appointments.

Graphics

Display image of paperwork 495625758

Interactions

Sync text with narration.

References

Policy Supplement #1130 Income Eligibility

WPM Policy #1160 Transfers and Verification of Certification

Online Verification

You may use a computer or smartphone to verify information online:

- Paystubs
- Unemployment
- Disability
- Child or Spousal Support
- Foster Care

You must see gross income for direct deposits



Audio

Next, you'll be learning about some sources of income that can be verified online. You should advise all WIC applicants and participants to bring proof of income to their certification or income reassessment appointments. However, in the event that they fail to bring proper documentation, you may use a computer or smartphone to access information that is available online.

In Part 1 you learned about online verification of Medicaid, SNAP, and TANF. In addition, you may be able to access paystubs or verify the following online: unemployment, disability, child or spousal support, and foster care. When verifying direct deposit paystubs online, you must see gross income.

Graphics

"Next you'll learn..." display image of support staff and participant 540728128

"In Part 1 you learned..." display image of computer 160888149

Interactions

Sync text with audio.

Add References button and citation.

References

Policy Supplement #1130 Income Eligibility

Unemployment Benefits

Unemployment benefits are counted as income:

- Six-months
- Monetary Benefit Determination Notice
- Online Verification
- Rate
- Severance
- Certification

Click each topic to learn more.



Audio

Any type of unemployment benefits received is counted as income. Click each topic to learn more about the different aspects of unemployment benefits.

Audio (with click of Duration)

Unemployment benefits are issued for 6-months. When the six-month period is up, the recipient may contact the New York State Department of Labor and request a one-time extension for an additional six-months.

Audio (with click of MBD Notice)

The Monetary Benefit Determination Notice is the letter that confirms that an individual is eligible to receive unemployment benefits. This letter shows the period of time for which the person will receive benefits and is the preferred method of verification. Individuals who are granted an additional six-month extension do not receive an additional letter. If you are presented with a letter that has already expired, use probing questions to determine the applicant's current status. Some unemployment recipients are also issued a Direct Payment Card, but this cannot be used as proof of income.

Audio (with click of Online verification)

All WIC applicants and participants are expected to bring proof of household income to their certification or income reassessment appointments. However, in the event that an unemployment recipient fails to do so, unemployment benefits can be verified online using either a computer or a smartphone.

Audio (with click of Rate)

When an applicant, participant or household member has just been laid off from work and has been authorized to receive unemployment benefits for the next six months then prospective income may be used. Rather than looking back at the income earned by this individual in the past 30 days, you may look at the unemployment income that the recipient will be receiving in the upcoming 30-days.

If an individual who is no longer receiving unemployment benefits is using annual income, then the unemployment benefits issued during the past year must also be included as part of the income for the household or economic unit.

Audio (with click of Severance)

Many individuals who are laid off from their jobs also receive severance pay in addition to receiving unemployment benefits. Severance pay must also be included as income. If the severance pay was received in one lump sum, then it may be counted as annual income.

Audio (with click of Certification)

Applicants, participants or household members receiving unemployment benefits that are determined to be income eligible for WIC are eligible for the duration of the certification period unless staff are notified of a change by the participant or a third party.

Graphics

Display image of Classified section of newspaper as the basis of the interaction 164379609. Label with bullet text and circle to highlight similar to what is shown in 178359977.

Interactions

Use the image as the basis of a clickable interaction. Allow learner to click each area. Upon click, display under button text and play corresponding audio.

(with click Six-months)

- Issued for six months
- One-time extension may be granted

(with click Monetary Benefit Determination Notice)

- Letter that confirms eligibility period
- Preferred method of verification
- No additional letter issued with extension
- Direct Payment Card cannot be used as proof of income

(with click of Online Verification)

- Unemployment benefits can be verified online

(with click of Rate)

- Use prospective income when applicant/participant laid off and authorized to receive benefits
- Include benefits received during past year when using annual income

(with click of Severance)

- Severance pay must be included as income unless using prospective income

(with click of Certification)

- Eligibility is for duration of certification period

Add References button and citation.

References

Policy Supplement #1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied

Disability

Click each topic to learn more about income from disability insurance.

- Types
- Verification Letter and Stubs
- Online Verification
- Rate
- Certification



Audio

Next, let's learn about income from disability insurance. Click each topic to learn more.

Audio (with click of Types icon)

There are two types of disability insurance, long term and short term. This insurance may come from varying sources. Participants or household members may receive long term disability from government programs such as Supplemental Security Income (SSI) or Social Security Disability (SSD), while others may receive short term disability from a plan that was provided by either their employer or an individual policy that they themselves purchased. Long term disability is issued to those who are permanently disabled or who have a more severe medical diagnosis that prevents them from working. Short term disability, which covers health conditions that are not permanent, such as recovery after an accident, surgery, or childbirth. Although you will see both types of disability in the WIC clinic, you are likely to see short term disability more often as many of our WIC moms work and receive this disability following childbirth.

Audio (with click of Verification Letter and Stubs icon)

Recipients of disability receive a Disability Verification letter. These letters include the recipient's name, his or her anticipated length of benefits, as well as the frequency and amount of the payments. Some recipients may present disability pay stubs. These are also an acceptable way to verify this income.

Audio (with click Online Verification icon)

All WIC applicants and participants are expected to bring proof of household income to their certification or income reassessment appointments. However, in the event that a recipient of disability fails to do so, disability may be verified online using either a computer or a smartphone.

Audio (with click of Rate icon)

When an applicant, participant, or economic unit member has just been authorized to receive disability benefits, then prospective income may be used. Rather than looking back at the income earned by this individual during the last 30 days, local agency staff may look at the disability income that the recipient will be receiving in the next 30 days.

Audio (with click of Certification icon)

Applicants, participants, or economic unit members receiving disability benefits that are determined to be income eligible for WIC, are eligible for the duration of the certification period, unless staff are notified of a change by the participant or a third party.

Graphics

Display image of wheelchair infographic 592374446 as the basis of the interaction. Label with the bulleted text.

Interactions

Allow learner to click each topic. Upon click of each topic display under button text and play corresponding audio.

(with click of Types icons – may show in columns)

Long Term:

- Government programs such as SSI or SSD
- Issued to those permanently disabled or who have a severe diagnosis

Short Term:

- Plan provided by employer or individual policy
- Covers health conditions that are not permanent

(with click of Verification Letter and Stubs)

Disability Verification letter includes:

- Recipient's name
- Anticipated length of benefits
- Frequency
- Amount

(with click of Online Verification)

- Disability can be verified online

(with click of Rate)

- Use prospective income when applicant/participant was just authorized to receive disability benefits

(with click of Certification)

- Eligibility is for the duration of certification period

Add References button and citation.

References

Policy Supplement #1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied

Combine Income with Changing Employment

When income sources have changed (within the past 30 days):

- Combine and average the paystubs manually
- Enter averaged income as “amount”
- Adjust frequency if needed
- Add most current proof as “verification” type
- Enter note that paystubs from a previous and current employer for past 30 days were averaged



Audio

An applicant, participant, or household member may present proof of current income from two different sources if those sources are due to changing employment within the past 30 days. Do not confuse this with participants that have multiple jobs and work them on a regular basis. Let's look at an example to help clarify this concept. Mary presents two weeks of pay stubs from her old job and two weeks of pay stubs from her new job. In situations like this, you must combine and average the pay stubs from both jobs and enter the averaged income in the, “amount,” data field in the management information system (MIS). If the frequencies of the two sources are different, you will have to convert them to the same frequency. For example, if Mary was paid once a week at the first job and bi-weekly at the second, you would need to calculate the weekly gross pay for Mary's second job before averaging the two sources together. Select “Pay Stubs/Direct Deposit Stubs” from the drop-down menu in the MIS under verification type.

[Added indent and new paragraph here for ease of reading]

You must write a note in the MIS indicating that the two sources of income were combined and averaged. This procedure would also be followed in situations when an applicant, participant or household member returns to work after receiving unemployment or disability and the income presented for the past 30 days is a combination of unemployment or disability and paystubs.

Graphics

Display image of participant 531111713 (remove background)

Interactions

Sync text with audio.

Add References button and citation.

References

Policy Supplement #1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied

Lump Sum Payments

Lump sum payments (new money) must be counted as annual income:

- Severance Pay
- Gifts of Money
- Inheritances
- Lottery/Gambling Winnings
- Insurance Settlements
- Worker's Compensation or Insurance Payments for Pain and Suffering (Punitive Damage)
- Lost Wages

Exclusions: loans that must be paid back, reimbursement payments for lost assets or medical expenses



Audio

Whenever an applicant, participant, or household member receives a lump sum payment, it is considered new money and must be counted as annual income. Examples of new money may include:

- Severance pay
- Gifts of money
- Inheritances
- Lottery or gambling winnings
- Insurance settlements
- Worker's compensation or insurance payments for pain and suffering, also known as punitive damage
- Lost Wages

Note that new money does not include loans that must eventually be paid back, or reimbursement payments for lost assets or medical expenses.

Graphics

Display image of money 173558412. Repeat and label the bills with the bullet text.

Interactions

Sync text with audio.

Add References button and citation.



References

WIC Policy #1130 Income Eligibility

Policy Supplement #1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied

Check Your Understanding: Lump Sum Payments Practice

 Included as Income	Replacement of lost wages Reimbursement for medical expenses Reimbursement for damages to car Compensation for pain and suffering	 Excluded as Income
---	--	---

Audio

An applicant, participant, or household member may receive an insurance settlement that includes more than one type of reimbursement. As an example, let's take a look at Melissa. Melissa is a WIC participant who was involved in a serious auto accident. The settlement that she received from the insurance company included: replacement of lost wages, reimbursement for medical expenses and damages to her car. Melissa also received compensation for pain and suffering. In this situation you must look at each portion of Melissa's settlement to determine what items should be included or excluded as income. Looking at this list of payments Melissa received, drag and drop each to the correct category.

Audio (feedback)

Good job. The replacement for lost wages and the compensation Melissa received for pain and suffering should be included as income. Remember, whenever an applicant, participant, or household member receives a lump sum payment, it is considered new money and must be counted as annual income. The reimbursements she received for medical expenses and damages to her car should not be included.

Graphics

"There may be times..." display image of participant 173250157

"In this situation..." replace image of participant with drag and drop items – check mark, trash can

Interactions

Create a drag and drop interaction. Show text under the columns when dropped (resize text after dropped if needed). Only allow correct drops. Once all items have been sorted, play feedback audio and show text, "Good job!"

Included:

Replacement of lost wages

Compensation for pain and suffering

Excluded:

Reimbursement for medical expenses




Reimbursement for damages to car

References

None.

Property of NYS DOH / May Not be Reproduced or Copied

Check Your Understanding: Student Income

 Include		Exclude 
<ul style="list-style-type: none">• Earnings from assistantship/employment• Cash from parents/guardians• Grants/scholarships used for room and board, living expenses, dependent care expenses		<ul style="list-style-type: none">• Financial assistance from programs funded under Title IV of Higher Education Act of 1965, including College Work Study program• Grants or scholarships for costs to attend an educational institution

Audio

Assessing the income eligibility of a student can sometimes prove to be quite complex. You must first determine what income the student has, and then determine what must be included and what can be excluded.

Examples of income that should be included are:

- Earnings from an assistantship or other employment
- Cash contributions from parents or guardians
- Grants or scholarships used by the student for living expenses including room and board

The following must be excluded as student income:

- Financial assistance received from any programs funded under Title IV of the Higher Education Act of 1965, including College Work Study program
- Grants or scholarships for costs to attend an educational institution which include:
 - Tuition and fees
 - Costs for rental or purchase of equipment, material or supplies in the same course of study
 - Allowance for books, supplies, transportation, and miscellaneous personal expenses for a student attending on at least a half-time basis

Graphics

“Assessing the income eligibility of a student...” display image of college student 176813207
(remove background)

“Examples of income...” display image of check mark

“The following must not be included...” display image of trash can

Interactions

Sync text with audio.

Add References button and citation.

References

WIC Policy # 1130 Income Eligibility

Policy Supplement #1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied

Child Support

All spousal and child support must be counted as income:

- Court order or signed letter from the court(preferred)
- Online verification
- Self-declaration

If income tax record is used, child support must be added as annual income



Audio

All spousal and child support must be counted as income. Many participants will present with a court order or a signed letter from the court, which is the preferred method of proof. Others may have access to an online account which is also acceptable. In situations where documentation does not exist, self-declaration may be used. If an income tax record is used as income documentation, know that child support is not listed. Therefore, it must be added as annual income.

Graphics

Display image of mother and child 153475359

Interactions

Sync text with audio.

Add References button and citation.

References

WIC Policy # 1130 Income Eligibility

Policy Supplement #1130 Income Eligibility

Foster Care



- Foster child is always an economic unit of one:
 - Verify Medicaid participation as majority will be Medicaid eligible
 - Must enter other income as, "estimate-adjunct eligible,"
 - If not, a letter or online verification may be used
 - Estimated income must include the stipend paid by the welfare agency, and,
 - Any other income earned by foster child independently
 - Exclude household income of foster family

Audio

Foster children present with their own unique set of circumstances about determining income eligibility. Remember that a foster child is always an economic unit of one which is important to know when assessing income and program eligibility.

The majority of foster children that you encounter will be Medicaid eligible. When a foster child's Medicaid is verified active, it is still necessary to enter each source of income coming into the household individually as, "estimate - adjunct eligible," into the MIS.

However, if the child is not participating in Medicaid, a letter or online verification may be used to provide income documentation. Estimated income or income must include the stipend paid by the welfare agency to the foster parents for the care of the child. In addition, any other income earned by the foster child independently, such as money from a trust fund, must also be counted as income.

The household income of the foster family is never used when determining a foster child's eligibility for WIC. Likewise, the money received for the care of a foster child is never counted as income for the foster family if they apply for WIC.

You can find an archived version of the [Children in Foster Care: What WIC Providers Need to Know](#) webinar on CAI's website for more information. Visit wictc.caiglobal.org and access this on the On-Demand webinar page.

Graphics

"Foster children..." display image of hands 99796377

"In addition..." display image of child 493888160

Interactions

Sync text with audio.

Add References button and citation.

References

WIC Policy #1130 Income Eligibility

Policy Supplement #1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied

Standard Self-Declaration

No Income Documents:

- Homeless, migrant farm workers, cash-only workers
- Applicant must complete self-declaration statement which is scanned into MIS
- Note reason in MIS

No Household Income:

- Signed statement not required
- Provide appropriate referrals and document in MIS
- Follow up at next visit

No limit to number of times used
Adjunct program eligibility can never be self-declared

Audio

Standard self-declaration may only be used in circumstances where no income documents exist or there is no household income.

Situations where income documents may not be available include persons who are homeless, migrant farm workers, and those who work on a “cash only” basis.

A self-declaration statement must be completed and signed whenever income is reported and the participant is unable to provide written documentation, if requiring those documents would pose an unreasonable barrier to participation. The self-declaration statement must then be scanned into the MIS, and you must enter the reason documents were not available in a note.

If there is *no* household income, a signed statement is not required. However, in keeping with the spirit of participant-centered services, ask open-ended questions to determine the needs and concerns of the participant and provide the appropriate referrals. Remember to document the referrals in MIS and also write a note so staff can follow up on the referral or referrals at the next WIC visit.

There is no limit to the number of times a standard self-declaration may be used, if it is within the confines of WIC policy. Remember, adjunct program eligibility can never be self-declared.

Graphics

Display image of handwriting 640216438; the image can be removed to make room for the second column of text.

Interactions

Sync text to audio

Add References button and citation.

References

WIC Policy # 1130 Income Eligibility

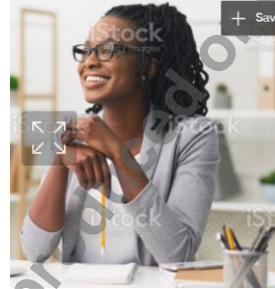
Policy Supplement #1130 Income Eligibility

Property of NYS DOH / May Not be Reproduced or Copied

Documenting Income Information in the MIS

Record income on the Income Information tab

- Verified on the day of certification or recertification
- Even if adjunctively eligible, enter estimates for each source of income separately
 - “Estimate-adjunct eligible,” from, “verification,” drop-down menu
- Income information needs to be entered once at household level



Audio:

Let's briefly review the process of documenting income information in the MIS.

Income information is recorded on the Income information tab. Remember, income information must be verified on the day of certification or recertification to be considered toward eligibility. If a participant or household is adjunctively eligible, as we reviewed in the previous module, you will still need to enter estimates for each source of income separately and select, “Estimate-adjunct eligible,” from the “verification,” drop down.

Since income information applies to the whole household, it needs to be entered once at household level, even if there is more than one WIC applicant or participant in the household. As mentioned, a moment ago, the exception is when the participant is a foster child and income must be individually documented.

Graphics

Display image of African American woman in modern office Stock photo ID:1170926292

Interactions

Sync text to audio

References

WIC Policy #1130 Income Eligibility

Policy Supplement #1130 Income Eligibility

Help document 11.7 The Income Information Tab in NYWIC

Property of NYS DOH / May Not be Reproduced or Copied

Training

File Scheduler Certification Benefits Miscellaneous Reports Messages

HH Information

This is the Income for: HH 300125342 *Household Size: 3

Adjunct Eligibility

Include in	Verification	Name	CAT	Adjunct	Elig	*REP	VER	*REP	VER	TANF	*REP	VER
<input checked="" type="checkbox"/>		Lewis, Monty M	INB		No		No		No			
<input checked="" type="checkbox"/>		Lewis, Shade S	WPG		No		No		No			

Not Participating In Any Program: ☒ Medicaid, SNAP, TANF

Not Participating - By Program: ☐ Medicaid ☐ SNAP ☐ TANF

#	Interval	Name	*Amount	Verification	*Annual	Date	*User ID
#4	Bi-Weekly	#5 Anatole Lewis	\$800.00	Pay Stubs/Direct Deposit Stubs	#9 \$20,800.00	9/17/2020	EUNDE
#1	Weekly	#2 Shade Lewis	\$250.00	Pay Stubs/Direct Deposit Stubs	#8 \$13,000.00	9/17/2020	EUNDE

Annual Income: #10 \$33,800.00

Buttons: Add, Remove, Guidelines, History, Referrals, Save, Cancel, Next

Version: 1.10.4.50 09/17/2020 09:17:50 AM

9:80101 Virtual Clinic 1 NYWIC-TRAINING

As you can see here, everyone with an income who resides in the same household as the WIC applicant or participant is individually recorded.

In this example, Shade presented pay stubs for herself and her husband which indicated that she was paid on a weekly basis. "Weekly," was selected from the "Interval," drop-down, her name was entered in the "Name," column, and \$250.00 a week was entered into the "Amount," column.

The process was then repeated for her husband, Anatole. "Bi-weekly," was selected from the drop-down for the pay "Interval," his name was entered into the "Name," column, and \$800.00 bi-weekly was entered into the "Amount," column. In both instances pay stubs were provided. "Pay Stub/Direct Deposit Stub," was selected from the "Verification," drop-down.

From these figures you will be able to see that Shade's annual income is \$13,000.00 a year, and Anatole's annual income is \$20,800.00 a year, which was automatically calculated once all income information was entered. Added together, the final household income for Shade and Anatole is \$33,800.00 dollars. From this point you must compare the annual income for a household of three to the federal guidelines we reviewed at the beginning of the module to make the determination whether Shade and her infant Monty are income eligible for the program.

Graphics

Display image of African American woman in modern office Stock photo ID:1170926292

Interactions

Sync red boxes to audio

On mention of, ""Weekly," was selected from the "Interval," drop-down," show red box #1.

On mention of, "her name was entered in the "Name," column," show red box #2.

On mention of, "and \$250.00 a week was entered into the "Amount," column," show red box #3.

Clear all boxes at the same time before moving on to the next trigger phrase below:

On mention of, ""Bi-weekly," was selected from the drop-down for the pay "Interval," show red box #4.

On mention of, "his name was entered into the "Name," column," show red box #5.

On mention of, "and \$800.00 bi-weekly was entered into the "Amount," column," show red box #6.

On mention of, "In both instances pay stubs were provided. "Pay Stub/Direct Deposit Stub," was selected from the "Verification," drop-down", show red box #7.

Clear all boxes at the same time before moving on to the next trigger phrase below:

On mention of, "Shade's annual income is \$13,000.00 a year," show red box #8.

On mention of, "and Anatole's annual income is \$20,800.00 a year," show red box #9.

On mention of, "for Shade and Anatole is \$33,800.00 dollars," show red box #10.

References







WIC Policy # 1130 Income Eligibility

Policy Supplement #1130 Income Eligibility

Help document 11.7 The Income Information Tab in NYWIC

Check Your Understanding – Question 1

Drag the description to the matching applicant.

 Receiving Unemployment	 Student	 Foster Child
 Paid weekly	 Self-Employed	 Out-of-State Transfer

Four paystubs
Net income
VOC card
Monetary Benefit
Determination
Scholarship used for
room and board
Payment from welfare
agency

Audio

Okay. Here's a brief check of your understanding of the topics in this section. Drag the statement that describes how an applicant can meet income eligibility requirements to the correct individual.

Audio – feedback

Each applicant or participant is unique when it comes to income verification. Review the correctly sorted items.

Graphics

Knowledge check screen

Display images to portray each of the applicants

Interactions

Upon submit, display correctly sorted items.

Correct Answers:

Receiving Unemployment: Monetary Benefit Determination

Student: Scholarship used for room and board

Foster Child: Payment from welfare agency

Paid Weekly: Four paystubs

Self-Employed: Net income

Out-of-State Transfer: VOC card

Feedback:

- Each applicant/participant is unique
- Review the correctly sorted items

Property of NYS DOH / May Not be Reproduced or Copied

Check Your Understanding – Question 2

Identify statements correctly describing procedures you must follow when assessing for income eligibility. Select all that apply.

- A. Use an income tax return from the past 5 years for self-employed applicants
- B. May use online verification of income for the following sources: wages, unemployment, disability, child/spousal support, and foster care
- C. Accept Disability Verification Letter issued to recipients that include name, length of benefits, frequency and amount
- D. Combining income sources is appropriate when an applicant has changed jobs within the last 30 days

Audio

Identify statements correctly describing procedures you must follow when assessing for income eligibility? Select all that apply.

Audio - feedback

Income tax Returns must be from the most recent filing.

Graphics

Knowledge check screen

Interactions

Correct Answer: B, C, D

Feedback:

Income tax Returns must be from the most recent filing.

References

None.

Check Your Understanding – Question 3

All of the following statements describe guidelines you must follow when assessing for income eligibility *except*?

- A. Lump sum payments such as severance pay, gifts of money, inheritances, lottery/gambling winnings, insurance settlements, worker's compensation, and insurance payments for pain and suffering are counted as income
- B. The preferred method of verification for spousal support and child support is a Court Order or Signed Letter from the Court
- C. Self-declaration of income is only used when there is no household income.
- D. A signed self-declaration statement is not required when there is no income

Audio

All of the following statements describe guidelines you must follow when assessing income eligibility except?

Audio - feedback

A signed self-declaration statement is required when an applicant self-declares income when no income documents exist. A signed statement is not required when there is no household income.

Graphics

Knowledge check screen

Interactions

Correct Answer: C

Feedback:

- Standard self-declaration may only be used in circumstances where no income documents exist or there is no household income.

References

None.

Property of NYS DOH / May Not be Reproduced or Copied

Recap

In this module, you learned:

- How to assess for income eligibility when an applicant or participant uses household income to qualify for WIC
- WPM Policy #1130 and the corresponding policy supplement are resources to look up information on what counts as income and what is excluded



Audio

Great job! You have completed Part 2 of Module 5: Income Eligibility. In Part 2, you learned how to assess for income eligibility when an applicant or participant uses household income to qualify for WIC. The WIC Program Manual Policy number 1130 and the corresponding policy supplement are great resources to use to look up information on what counts as income and what is excluded. Next, in Part 3 of Module 5, you will learn about a few additional topics related to income eligibility such as the 30-day certification, the income reassessment, writing notes and what to do if participants do not qualify for WIC.

You may now exit this module.

Graphics

Display image of support staff 175444442

Interactions

Sync text with audio.

References

None.