



Professional Development

americanjobcenter®

WIOA Low-Income Eligibility Tailored for LWIA 7

September 14th, 2023

Objective

- The primary objective of this presentation is to discuss the various ways a Workforce Innovation and Opportunity Act (WIOA) client could meet WIOA Low-Income criteria
- Secondly, it will discuss the various WIOA Low-Income criteria are recorded on a client's electronic record in Career Connect and the various tools that are available on the Career Connect Zen Desk to assist with determining WIOA Low Income criteria

Federal Guidance

- Workforce Innovation and Opportunity Act of 2014 is the overall driving factor for all the WIOA programs
- TEGL 19-16 - Guidance on Services Provided through Adult and Dislocated Worker under WIOA - dated March 1st, 2017
- TEGL 21-16 - Third WIOA Title I Youth Formula Program Guidance - dated March 2nd, 2017
 - Change 1 to TEGL 21-16 was issued July 30th, 2021 - Deals with the updated process for Determining Low Income for Youth Living in a High Poverty Area
- TEGL 09-22 - WIOA Title I Youth Formula Guidance - dated March 2nd, 2023

Understanding the ePolicy Manual

The Illinois Department of Commerce and Economic Opportunity, Office of Employment and Training (OET) utilizes a WIOA ePolicy portal to maintain all current and new guidance issued by the Illinois Workforce Innovation Board (IWIB) and OET.

Homepage: www.illinoisworknet.com/DCEOPolicies

Guiding Innovation
Illinois WIOA Policy

Policy Chapters & Sections A-Z Listing Archived Policy Print Policy

As the Governor's designated agency for the Workforce Innovation and Opportunity Act (WIOA) Title 1 Workforce Development Activities and the Trade Adjustment Assistance Act, the Department of Commerce Office of Employment and Training (OET) provides policy and guidance to the Local Workforce Innovation Boards for the delivery of workforce services. The ePolicy manual contains this policy, related documents, and resources to support the implementation and provision of service under WIOA. To keep up on the latest information, please subscribe to e-mail notifications of any policy issuances and updates.

ePolicy Chapters and Sections A-Z Archive Print

ePolicy Chapters and Sections

State Policy Guidance

- WIOA ePolicy Chapter 5 Section 5 - Low-Income Individuals
 - Attachment A - Documentation
 - Attachment B - Income Inclusions/Exclusions
- WIOA Notice NO. 22-NOT-01 - Revised Income Guidelines for Determining Low-Income Status for WIOA Eligibility - dated May 14th, 2023

LWIA 7 Local Policy Guidance

- Besides the guidance in Federal and State Policies, each Local Workforce Innovation Area (LWIA) has the latitude to establish additional Local Policy Guidance
- Chicago Cook Workforce Partnership does an exceptional job conducting tailored virtual trainings/webinars and has developed a Staff Training Guide that can be accessed on the Career Connect Zen Desk: [LINK:
https://workforceboard.zendesk.com/hc/en-us/articles/7760807734541--WIOA-Staff-Training-Guide-Worksheet](https://workforceboard.zendesk.com/hc/en-us/articles/7760807734541--WIOA-Staff-Training-Guide-Worksheet)
(See next slide)



LWIA 7 Local Policy Guidance

Chicago Cook Workforce Partnership

WIOA

Training Guide



PURPOSE FOR THE TRAINING GUIDE

To assist agencies with the following:

- Navigating Career Connect Help Desk
- Onboarding New Agency/Staff
- Refresher /Crash Course

Access Career Connect Help Desk at: <https://workforceboard.zendesk.com/hc/en-us>

The help desk is a website where the partnership houses state and local policies and procedures. We refer to this as our electronic library where you can find forms, documents and webinars and submit a help desk ticket.

LWIA 7 Local Policy Guidance

- Besides the guidance in Federal and State Policies, each Local Workforce Innovation Area (LWIA) has the latitude to establish additional Local Policy with WIOA Low Income guidance
- Chicago Cook Workforce Partnership, also known as LWIA 7, does have additional guidance in Local Workforce Innovation and Opportunity Act (WIOA) Policy No. 2018-PL-05, Change 1 dated September 25th, 2018

LWIA 7 Local Policy Guidance

- Additional Chicago Cook Workforce Partnership (LWIA 7) Low Income Guidance on Self-Report Income Procedure dated on November 15th, 2018
- What this guidance states, even though a client being served under the Dislocated Worker title, and certain Out-of-School Youth clients (depending on barriers,) are not required to meet low-income criteria for eligibility, the Partnership still requires an income calculation completed on those individuals

WIOA Low Income

- To ensure you fully understand the LWIA 7 Local Policy on WIOA Low Income and the LWIA 7 Local Policy on Self-Report Income Procedure, please refer any specific questions you might have to your Partnership Regional Program Manager
- Now on to the WIOA Low Income presentation based on Federal and State of Illinois guidance

The eight ways a WIOA Client could become qualified as Low-Income:

1. Cash Welfare
2. Food Stamps
3. Homeless
4. Free or Reduced Priced Lunch
5. Foster Child
6. Youth Customer Living in a High Poverty Area
7. Family Income Calculation
8. Family of One Due to Disability

Low-Income Verification

- To meet WIOA Low-Income criteria, a client would only need to meet one of the eight different Low-Income criteria
- However, if a client claims to meet Low-Income criteria multiple ways, then the expectation at eligibility determination/certification would be to have verification documentation to support each Low-Income criteria claimed

WIOA Low-Income Criteria that do not require an income calculation:

1. Cash Welfare
2. Food Stamps
3. Homeless
4. Free or Reduced Priced Lunch
5. Foster Child
6. Youth Customer Living in a High Poverty Area

Low Income in Career Connect

In Career Connect these 5 ways to record WIOA Low Income criteria can be found in the WIOA Application under the **Public Assistance Tab**:

1. Cash Welfare (TANF)
2. Food Stamps (SNAP)
3. Free or Reduced Priced Lunch
4. Foster Child
5. Youth Customer Living in a High Poverty Area

WIOA Low-Income Criteria

The criteria for Cash Welfare and Food Stamps is:

Personally receives or is a member of a family that receives or received in the past six (6) months either Cash Welfare or Food Stamps (This wording for these low-income criteria is directly out of the Federal and State WIOA guidance.)

WIOA Family Definition

The term “family” means two or more persons related by blood, marriage, or decree of the court who are living in a single residence and are included in one or more of the following categories:

- (A) A married couple and dependent children
- (B) A parent or guardian and dependent children
- (C) A married couple



WIOA Low-Income Criteria

To tie this criteria together, the client or a member of the client's WIOA defined family must either be on Cash Welfare or Food Stamps, either currently or within the past six months of the client's WIOA application before a client could be determined Low-Income due to Cash Welfare or Food Stamps

Question about Family?

Referring to the WIOA family definition, Charlie and Betty live together, are not married, and have a son, Tommy:

- **Q - Betty comes in for WIOA services; how many people are in her WIOA defined family, and who are they?**

Response to the Family Question

Referring to the WIOA family definition, Charlie and Betty live together, are not married, and have a son, Tommy:

- Q - Betty comes in; how many people are in her WIOA defined family, and who are they?
- **A - Family size of two, Betty and Tommy. Based on the WIOA Definition of family, Charlie and Betty would need to be married to be considered a family of three in this situation.**

WIOA Low-Income: Cash Welfare

- 1. Temporary Assistance for Needy Families (TANF) program under Part A of Title IV of the Social Security Act, or**
- 2. Supplemental Security Income (SSI) program established under Title XVI of the Social Security Act, or**
- 3. State or local income-based public assistance**

Capturing TANF in Career Connect

Title I - Workforce Development (WIOA)

Education

Public Assistance

- ✓ [Intro](#)
- ✓ [Veteran](#)
- ✓ [Public Assistance](#)
- ✓ [Household And Income](#)
- ✓ [Eligibility Summary](#)

- ✓ [Contact](#)
- ✓ [Employment](#)
- ✓ [Barriers](#)
- ✓ [Miscellaneous](#)

- ✓ [Demographic](#)
- ✓ [Education](#)
- ✓ [Family Income Worksheet](#)
- ✓ [State Specific](#)

Here you can “verify” what document was used for Cash Welfare (TANF)

Individual or member of a family that is receiving, or in the past 6 months has received, the following:

* Temporary Assistance for Needy Families (TANF) recipient:

Yes No

TANF Recipient Type:

Applicant Family Member Not Applicable/Unknown

Verify:

[[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]



TANF Verification

- Public assistance records/printout
- Copy of public assistance check
- Copy of Authorization to Receive Cash Public Assistance
- Public Assistance Identification showing Cash Grant Status



Food Stamp Program for School Aged Youth

As recently as August 2023, Illinois Department of Human Services (IDHS) in collaboration with Illinois State Board of Education has issued School Pandemic Electronic Benefit Transfer (P-EBT) cards for families with children who are eligible for free or reduced lunches at school

Pandemic Electronic Benefits Transfer

- IDHS' Pandemic Electronic Benefits Transfer (P-EBT) is part of a SNAP COVID-19 waiver [SNAP COVID-19 Waivers | USDA-FNS](#)
- In relation to WIOA Low Income due to food stamps, any individual or member of a family that receives food stamps or has received food stamps in the past six months would meet WIOA Low-Income criteria

Pandemic Electronic Benefits Transfer Documentation

- It has been brought to OET's attention that there is no date provided on these P-EBT white cards, in many cases it appears that the Youth are receiving a white EBT card with only their name and no issue date
- Along with capturing a copy of the white P-EBT card, **staff should also obtain a client (or parent) self-attestation on when the Youth began receiving the P-EBT benefit and if they are no longer receiving the benefit, when did it end**

P-EBT WIOA Low Income

An important distinction to reiterate, this is a food stamp benefit that will fall under the criteria of “**Personally receives or is a member of a family that receives or received in the past six (6) months the Supplemental Nutrition Assistance Program (SNAP) assistance.**”

Question about Food Stamps

Q - Tommy receives P-EBT; Tommy lives with his Mom, Betty. If Betty came in for WIOA Services, could she be determined Low-Income based on food stamps, even though she (Betty) is not receiving food stamps?

Answer to Food Stamps Question

Q - Tommy receives P-EBT; Tommy lives with his Mom, Betty. If Betty came in for WIOA Services, could she be determined Low-Income based on food stamps, even though she (Betty) is not receiving food stamps?

A - WIOA Low-Income criteria can be determined based on, “Personally receives, or is a member of a family that receives or received in the past six (6) months the Supplemental Nutrition Assistance Program (SNAP) assistance.”

- **Since Betty lives with her son Tommy, who is receiving food stamps via P-EBT, she could be determined Low-Income based on her son Tommy receiving food stamps**

Capturing Food Stamps in Career Connect

Title I - Workforce Development (WIOA)

Education

Public Assistance

- ✓ [Intro](#)
- ✓ [Veteran](#)
- ✓ **Public Assistance**
- ✓ [Household And Income](#)
- ✓ [Eligibility Summary](#)

- ✓ [Contact](#)
- ✓ [Employment](#)
- ✓ [Barriers](#)
- ✓ [Miscellaneous](#)

- ✓ [Demographic](#)
- ✓ [Education](#)
- ✓ [Family Income Worksheet](#)
- ✓ [State Specific](#)

* Supplemental Nutrition Assistance Program (SNAP) recipient: Yes No

* Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Here you can “verify” what document was used for SNAP



SNAP Food Stamp Verification

- Letter from food stamp disbursing agency
- Public assistance records/printout
- Authorization to Obtain Food Stamps

Low-Income: Homeless

1. Individual who lacks a fixed, regular or adequate nighttime residence; as defined under the:

[Violence Against Women Act of 1994](#)

2. Adult or Youth with a primary nighttime residence that is a public or privately operated shelter for temporary accommodation.

[McKinney-Vento Homeless Assistance Act](#)

Homeless Definitions Question

Q - Could a male client be determined homeless utilizing the definition under the Violence Against Women Act of 1994?

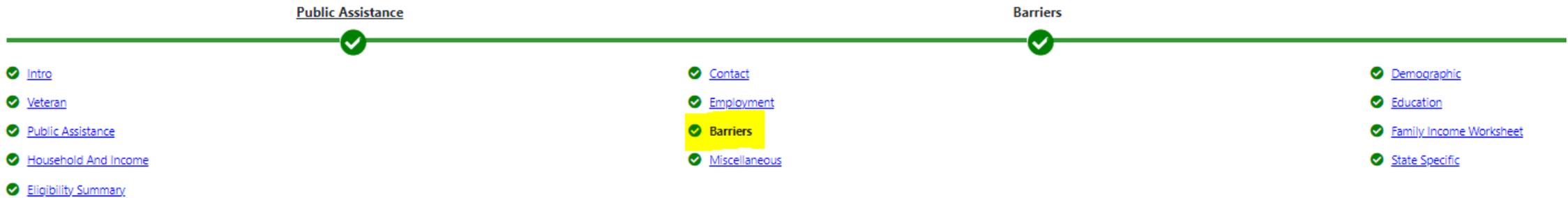
Answer to Homeless Question

Q - Could a male client be determined homeless utilizing the definition under the Violence Against Women Act of 1994?

A - Yes, for all clients (male or female) either the Violence Against Women Act of 1994 or McKinney-Vento Homeless Assistance Act definitions could be used to determine a client's homeless status.

Capturing Homeless in Career Connect

In Career Connect Homeless is recorded on the WIOA Application under the Barriers Tab:



* Homeless:

Yes No

Verify:

[[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]



Homeless Verification

- Written statement from shelter
- Written statement from an individual providing temporary assistance
- Written statement from Social Service agency
- Signed applicant statement

Low-Income: Free or Reduced Priced Lunch

Receives or is eligible to receive a free or reduced-price lunch under the

[Richard B. Russell National School Lunch Act](#)

Criteria for In-School Youth Only

- Must have documentation from school

Low-Income: Free or Reduced Priced Lunch

TEGL 21-16 and our Low-Income Policy clarified that “In schools where the whole school automatically receives free or reduced-price lunch, WIOA programs must base Low-Income status on an individual student’s eligibility to receive free or reduced-price lunch or on meeting one of the other Low-Income categories under WIOA;

- Meaning if only whole school criteria is used for free or reduced lunch, you cannot use this method to determine Low-Income criteria and must use one of the other Low-Income categories to determine an individual’s Low-Income status

Question about Free or Reduced Priced Lunch

Q - Sally is currently a Junior in H.S., and in the school district she attends, all students are eligible for free lunch. She has applied for WIOA services, what documentation would be needed to support her WIOA Low-Income Criteria due to free or reduced lunch?

Answer to Question about Free or Reduced Priced Lunch

Q - Sally is currently a Junior in H.S., and in the school district she attends, all students are eligible for free lunch. She has applied for WIOA services, what documentation would be needed to support her WIOA Low-Income Criteria due to free or reduced lunch?

A - The documentation would need to specifically address that Sally herself, by name, is eligible for free or reduced lunch. If the school will not provide information about an individual, then the client must find another way to support WIOA Low-Income criteria.

Free or Reduced Lunch or P-EBT

- In many instances, schools may have temporarily replaced the free or reduced-price lunch program with the IDHS' Pandemic Electronic Benefits Transfer (P-EBT), which is part of a SNAP COVID-19 waiver [SNAP COVID-19 Waivers | USDA-FNS](#)
- Big difference, free or reduced-priced lunch is the only criteria for the In-School Youth client Low-Income; where the P-EBT could be for Youth and any individual in the Youth's WIOA Family for Low-Income criteria

Capturing Free or Reduced Lunch in Career Connect for In-School Youth

Title I - Workforce Development (WIOA)

Education

- ✓ [Intro](#)
- ✓ [Veteran](#)
- ✓ [Public Assistance](#)
- ✓ [Household And Income](#)
- ✓ [Eligibility Summary](#)

Public Assistance

- ✓ [Contact](#)
- ✓ [Employment](#)
- ✓ [Barriers](#)
- ✓ [Miscellaneous](#)
- ✓ [Demographic](#)
- ✓ [Education](#)
- ✓ [Family Income Worksheet](#)
- ✓ [State Specific](#)

Here you can “verify” what document was used for Free or Reduced Lunch:

*Youth currently receives, or is eligible to receive, free or reduced lunch under the Richard B. Russell National School Lunch Act:

Yes No Not Provided

Verify:

[[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Free/Reduced Lunch Verification



Documentation from School

Low-Income: Foster Child

- Under WIOA, a Foster Child is defined as: **A minor on behalf of whom State or local government payments are made to a foster parent or other guardian**
- If an individual is a foster child, it is an automatic WIOA Low-Income criteria

Question about Foster Child Documentation

Q - Conrad is currently a Senior in H.S., he lives with his foster parents. What is the documentation that could be used to support his WIOA Low-Income Criteria due to Foster Child status?

Foster Child Documentation

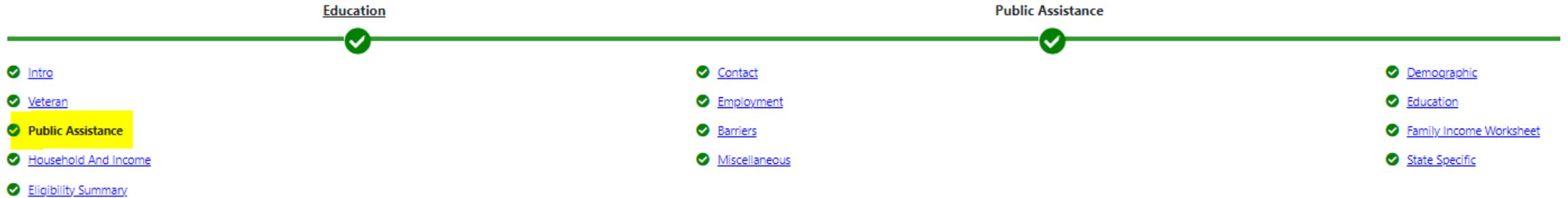
Q - Conrad is currently a Senior in H.S., he lives with his foster parents. What is the documentation that could be used to support his WIOA Low-Income Criteria due to Foster Child status?

A - The documentation choices to support Foster Child status to support WIOA Low-Income criteria are listed in Attachment “A” to Commerce WIOA Low-Income Policy WIOA ePolicy Chapter 5.5:

- **To support foster child status the following are acceptable choices: Court Contact; Court Documentation; Medical Card showing Foster Child Status; Verification of Payment made on behalf of the child; Written Statement from State/Local Agency**

Capturing Foster Child in Career Connect

Title I - Workforce Development (WIOA)



Here is where you can “verify” what document was used for Foster Child:

* Foster Child (State or local payments are made for applicant): Yes No

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]



Foster Child Verification

- Court Contact
- Court Documentation
- Medical Card showing Foster Child
- Verification of Payments made on Behalf of the Child
- Written Statement from State/Local Agency



Youth Living in a High-Poverty Level

According to Section 129(a)(2) of WIOA legislation, for ISY and OSY, a Youth qualifies as Low-Income if the Youth lives in a high-poverty area

Guidance in TEGL 21-16, Change 1

- According to Section 129(a)(2) of WIOA, for ISY and OSY, a Youth qualifies as Low-Income if the Youth lives in a high-poverty area
- Many rural counties in the U.S. have a poverty rate of 25 percent or above
- TEGL 21-16 - Third WIOA Title 1 Youth Formula Program Guidance - dated March 2nd, 2017
 - **Change 1 to TEGL 21-16 was issued July 30th, 2021** - Updated guidance related to the process for Determining Low-Income for Youth Living in a high-poverty area
 - Revised directions as of November 30, 2021

Revised Directions November 2021

- Revised directions as of November 30, 2021, for using American Community Survey data to determine high-poverty areas are as follows:
 - Section 1 describes how to determine if an individual Youth lives in a high-poverty area based on their street address
 - Section 2 describes how to identify if an overall county has a poverty rate of 25 percent or above
 - Section 3 describes how to determine the poverty rate of American Indian Reservations, Oklahoma Tribal Statistical Areas, and Alaska Native Village Statistical Areas
 - Section 4 describes how to identify high-poverty areas in your county for targeting your services on high-poverty neighborhoods

Partnership Guidance

- For those contracted WIOA Youth Service Providers under LWIA 7, the Partnership has done most of the heavy lifting based on their local guidance related to Youth Living in a High Poverty Area.
- Below is the LINK to the “High Poverty Area” procedure that is posted on the Zen Help Desk that was updated 7-1-2021:

LINK: <https://workforceboard.zendesk.com/hc/en-us/articles/115000795052-High-Poverty-Area-Procedure-UPDATED-7-1-2021->

LWIA 7 Local Guidance

Articles in this section

Career Exploration
Procedure (Updated
3/28/2023)

Case Note Guidance
Document (Updated
2/6/2023)

Closure/Exit Procedure
(Updated 3/17/2023)

Credential Procedure
(Updated 4/7/2023)

IEP/ISS Procedure (Updated
04/06/2023)

Measurable Skills Gains
(MSG) Procedure (Updated
3/17/2023)

Objective Assessment
Summary (OAS) Procedure
(Updated 3/28/2023)

1N & 1E Eligibility & Service
Procedure

File Destruction Procedure

High Poverty Area Procedure
(UPDATED 7/1/2021)

High Poverty Area Procedure (UPDATED 7/1/2021)



Kristen Chevali

1 year ago · Updated

Follow

High Poverty Area Procedure

Purpose

The purpose of this procedure is to identify the High Poverty Areas within Cook County and to provide instructions for how to verify and document that an **In-School Youth** or **Out-of-School Youth** resides in a High Poverty Area.

References

Illinois Department of Commerce (IDOC) WIOA POLICY 15- WIOA- 4.5

U.S Department of Labor WIOA Final Rule 20 CFR Part 680

Chicago Cook Workforce Partnership Youth Eligibility Policy # 2016--04

Chicago Cook Workforce Partnership Low Income Policy #2016-05



WorkforceGPS / Youth Connections / Community Resources / Directions for Determining High-Poverty Areas for the WIOA Youth Formula Program



POST INFORMATION

Likes: 1

Views: 1887

Last Updated: 12/10/2021

Resource Publication Date: 2021

Posted By: Adrienne Bailey

Posted In: Youth Connections

Directions for Determining High-Poverty Areas for the WIOA Youth Formula Program

Resource

The WIOA youth formula program allows youth living in high-poverty areas to be considered low-income individuals. The Census Bureau has changed its website for accessing American Community Survey data, and so this is to provide revised instructions on how to use Census data to document high-poverty areas.

This document provides revised directions for using Census data to determine high-poverty areas for the WIOA Youth Formula Program.

If you run into problems with these directions, you can send an e-mail to youth.services@dol.gov for technical assistance.

The directions will be updated as necessary if the Census Bureau website changes.

This current update is as of November 30, 2021.

Question about High-Poverty Area

Q - If a Youth client is determined Low-Income based on living in a high-poverty area, and then later you would like to co-enroll the client into Adult services, could you certify under Adult Low-Income utilizing the high-poverty area criteria?

Answer about High Poverty Area ?

Q - If a Youth client is determined low-income based on living in a High Poverty Area, and then later you would like to co-enroll the client into Adult services, could you certify under Adult Low-Income utilizing the High Poverty Area criteria?

A - No, only Youth clients can utilize the criteria of living in a High Poverty Area for determining WIOA Low-Income.

Capturing Youth Living in a High Poverty Area in Career Connect

Title I - Workforce Development (WIOA)

Education

- ✓ [Intro](#)
- ✓ [Veteran](#)
- ✓ [Public Assistance](#)
- ✓ [Household And Income](#)
- ✓ [Eligibility Summary](#)

Public Assistance

- ✓ [Contact](#)
- ✓ [Employment](#)
- ✓ [Barriers](#)
- ✓ [Miscellaneous](#)

- ✓ [Demographic](#)
- ✓ [Education](#)
- ✓ [Family Income Worksheet](#)
- ✓ [State Specific](#)

Here is where you can “verify” what document was used for High Poverty area:

Individual currently meets the following:

*Youth Currently living in high-poverty area:

Yes No Not Provided

Verify:

[[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

High Poverty Verification

 Documentation Verifying High Poverty Area



Income Calculations in Career Connect

In Career Connect the remaining 2 ways can be recorded in the WIOA Application on 2 screens, Family Income Worksheet and the Household and Income screen

7. Family Income Calculation

8. Family of One Due to Disability

Family Income Calculation

A Family Income Calculation is only needed to determine Low-Income if the client does not meet any of the six automatic Low-Income qualification criteria previously covered

Family Income Calculation

- Total family income that does not exceed the higher of:
 - The poverty line; or
 - Seventy percent (70%) of the lower living standard income level
- WIOA Notice NO. 22-NOT-01 - Revised Income Guidelines for Determining Low-Income Status for WIOA Eligibility - dated May 14th, 2023, under Attachment “B” lists the income thresholds by Local Workforce Innovation Area (LWIA) and family size when determining Low-Income using a Family Income Calculation

State Policy on the Current Low-Income Levels

| These Guidelines are in effect From: May 15, 2023 To: Continuing | | | |
|---|--|--|--|
| Size of Family Unit | LWIAs 1, 2, 5, 6, 7, 10 | LWIAs 22 and 24 | LWIAs 3, 4, 11, 13, 14, 15, 17, 18, 19, 20, 21, 23, 25, 26 |
| 1 | <i>\$14,580</i> | <i>\$14,580</i> | <i>\$14,580</i> |
| 2 | <i>\$19,720</i> | <i>\$19,720</i> | <i>\$19,720</i> |
| 3 | <i>\$25,099</i> | <i>\$24,860</i> | <i>\$25,000</i> |
| 4 | <i>\$30,987</i> | <i>\$30,000</i> | <i>\$30,863</i> |
| 5 | <i>\$36,571</i> | <i>\$35,140</i> | <i>\$36,419</i> |
| 6 | <i>\$42,771</i> | <i>\$40,280</i> | <i>\$42,600</i> |
| | For family units with more than six members, add \$6,200 for each additional member | For family units with more than six members, add \$5,679 for each additional member | For family units with more than six members, add \$6,181 for each additional member |
| * An Italicized income level indicates the 2023 Poverty Guideline was higher than the LLSIL for the selected MSA, and thus that level was used. | | | |

Revised May 12, 2023

Family Income Calculation in Career Connect

Chicago Cook Workforce Partnership staff have done an exceptional job of conducting various webinar/virtual trainings. One webinar/virtual training conducted was on WIOA Low Income Calculation and directly below is where the information is posted on the Career Connect Zen Desk:

[Chicago Cook Workforce Partnership](#) > [WIOA Programs](#) > [Recorded Webinars](#)

Articles in this section

[Career Connect Tips & Tricks Webinar](#)

[Career Connect v20: A New Look Webinar](#)

[Credentials/Employment/Closure Webinar](#)

[Hospitality Hires Chicago Event Webinar](#)

[Income Calculation Webinar](#)

Income Calculation Webinar



Kristen Chevali

4 years ago · Updated

Please click the link below to view and listen to the Income Calculation webinar.

LINK: [Income Calculation Webinar](#)



Family Low Income Calculation

- Must capture the income of everyone within the WIOA defined family
- Pay stubs or other acceptable documentation for each of the family member's income
- Documentation supporting family size

Must Have WIOA Defined Family Identified

The term “family” means two or more persons related by blood, marriage, or decree of court who are living in a single residence and are included in one or more of the following categories:

- (A) A married couple and dependent children
- (B) A parent or guardian and dependent children
- (C) A married couple

WIOA Low Income Calculation

Chicago Cook Workforce Partnership has provided an “Income Calculation Worksheet” that must be used when an income calculation is being completed:

[Chicago Cook Workforce Partnership](#) > [WIOA Programs](#) > [Income Calculation Guidance](#)

Articles in this section

[Income Guidelines](#)
Effective 5/15/2023

[IBIS Fact Sheet](#)

[Inclusions and Exclusions for Determining Family Income](#)

[Income Calculation Calendars](#)

[Income Calculation Worksheet](#)

Income Calculation Worksheet



Kristen Chevali
5 years ago · Updated

Attached is the electronic version of the Income Calculation Worksheet.

 [Income Calculation Worksheet-03072018.xlsx](#)

30 KB · [Download](#)





Professional Development
americanjobcenter

Family Income Calculation in Career Connect

In Career Connect Family Income is first recorded on the Family Income Worksheet tab:

Title I - Workforce Development (WIOA)

Barriers

Family Income Worksheet

- Intro
- Veteran
- Public Assistance
- Household And Income
- Eligibility Summary

- Contact
- Employment
- Barriers
- Miscellaneous

- Demographic
- Education
- Family Income Worksheet**
- State Specific

Family Income Worksheet

Low income has already been established based upon previous entries. Family size and income are optional.

Total Annual Income: 0.00

| Income Worksheet | 1 | 2 | 3 | 4 | 5 | 6 | Total |
|----------------------|------|------|------|------|------|------|-------|
| Wages: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Self-Employed Wages: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Pension: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Insurance Annuity: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Alimony: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| UI Benefits: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Other: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

6 Month Income: 0.00
X 2
12 Month Income: 0.00

Family Income Calculation in Career Connect (Continued)

The second step to record Family Income is on the Household and Income tab. Family size must also be documented.

Income Information

Due to the individuals disability, they Yes No
qualify as a Family of 1:

Low income has already been established based upon previous entries. Family size and income are optional.

Family Size:

None Selected

Verify:

[[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]



Family Size Verification

- Birth Certificate
- Current Tax Return w/IRS Documents (See Appendix A)
- Decree of court
- Disabled (See Individuals with Disabilities)
- Divorce Decree
- Landlord Statement
- Lease
- Marriage Certificate
- Medical Card
- Public assistance / Social Service Records
- Public Notice of Closing
- Signed applicant statement
- Statement from Individual Providing Temporary Residence
- Statement from Publicly Supported Facility or Institution

Annualized Family Income (last 6 months X2):

0.00

Verify:

[[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Family Income Verification

- Pay stubs
- Alimony agreement
- Bank statements
- Business or Farm financial records
- Compensation award letter
- Court award letter
- Employer Statement/Verification
- Housing authority verification
- Pension/Annuity Statement
- Public assistance records
- Quarterly estimated tax for self-employed persons (Schedule C)
- Social Security Benefits
- Unemployment insurance documents and/or printout
- Veterans Administration Award Letter
- Signed applicant statement

WIOA Low Income Calculation

- Within Career Connect, you are tasked with recording the WIOA determined family income for the six months preceding the application date
- As part of the Partnership local policy on WIOA low income, the Partnership have put together the maximum income allowed for determining low- income status (See the next slide.)



Income Level Tailored by LWIA 7

**Chicago Cook Workforce Partnership Workforce Division
Income Guidelines
For Determination of Low Income Status under WIA**

Partnership has put together an at-a-glance tool to assist with understanding the current low income calculation levels:

| Size of Family Unit | LWIA #7 |
|---|-----------|
| 1 | \$ 14,580 |
| 2 | \$ 19,720 |
| 3 | \$ 25,099 |
| 4 | \$ 30,987 |
| 5 | \$ 36,571 |
| 6 | \$ 42,771 |
| For family units with more than six members, add \$6,200 for each additional | |

| Month of Application | Six Months Prior to Month of Application |
|---|--|
| January | July |
| February | August |
| March | September |
| April | October |
| May | November |
| June | December |
| July | January |
| August | February |
| September | March |
| October | April |
| November | May |
| December | June |
| <p>These guidelines are in effect: From: May 15, 2023 To: Continuing</p> | |

If Not Living with WIOA Family Members

- Guidance was provided on page 7., of TEGL 21-16, that *“if an individual is not living in a single residence with other family members, that individual is not a member of a family for purposes of WIOA income calculations.”*
- Meaning, if an individual is not living with their WIOA defined family, then their income determination should be based on their own income only.

Income Calculation Question

Q - A 19-year-old individual Tom, is applying for the WIOA program. He lives with his older sister, Tori and their cousin, Sue who is 23. Both Tori and Sue are also thinking about applying for WIOA. If each of these individuals would come in for WIOA services, How many people would be in the WIOA defined family for each? Whose income would be included to determine the low-income status for each?



Professional Development
americanjobcenter

Answer to the Income Calculation ?

Q - A 19-year-old individual Tom, is applying for the WIOA program. He lives with his older sister, Tori and their cousin, Sue who is 23. Both Tori and Sue are also thinking about applying for WIOA. If each of these individuals would come in for WIOA services, How many people would be in the WIOA defined family for each? Whose income would be included to determine the low-income status for each?

A - None of these individuals (Tom, Tori, Sue) meet the criteria under the WIOA family definition, in each case the family size would be one - each of these individual's Low-Income status would be based on their own income.

Note: if you are unsure of this answer, please refer to WIOA Family definition on slide 50, in this instance, even though all individuals that are living together are related, no individual is serving as a parent or guardian over the other individuals living in the home.

IBIS Requirements



CHICAGO COOK WORKFORCE PARTNERSHIP

IBIS FACT SHEET

Chicago Cook Workforce Partnership (Partnership) has local guidance that **requires** Illinois Benefit Information System (IBIS) printouts for circumstances when an income calculation is being completed:

1. An IBIS will be required for:

- All *family members 18 years of age and over that are INCLUDED on the “Family Income” screen. Do not list people not considered family members, such as, cousins, uncles, aunts, grandparents, and god parents, family friends, etc...
- Any applicant 18 years or older with a self-attestation stating the applicant does not have income or that applicant is reporting themselves as self-employed.
- Applicants who provide a check stub(s) as proof of income and the year-to-date amount on the check stub(s) fails to cover the entire prior six month period.
- Any participant 18 years of age and over with no income and produces a “room and board” letter requires:
 - An applicant statement indicating there is no income.
 - An IBIS report for the applicant.
 - The applicant is considered a family of one.

IBIS Requirements

The Partnership also has local guidance for instances when IBIS printouts are not required as listed under section 2. on the IBIS Fact Sheet:

2. An IBIS will not be required for anyone who falls into the following categories:

- Food Stamps (SNAP)
- TANF
- Homelessness (Any applicant 18 years old or older and who is temporarily living with anyone other than their spouse or parents is considered Homeless and should simply provide a written self-attestation stating they are homeless and temporarily residing with that person. No IBIS is necessary.
- Foster Child
- SSI
- 5% Window (youth)
- Self-Reported Income Attestation (not allowable for income eligibility or priority of service determination)

Family Income Calculation Requirements

- It is essential to view DCEO WIOA Policy 5-5 - Low-Income Individuals - specifically Attachment “B” - Inclusions and Exclusions for Determining Family Income
- Any family member that are included in the WIOA defined family of the applicant must have their “included” income for the previous six months prior to the application date recorded as part of the family income calculation

Includable Income Per State Policy

Inclusions and Exclusions for Determining Family Income

Included in Family Income

- Any monetary compensation for services, including wages, tips, salary, commissions, or fees, before any deductions
- Wages received while on reserve/guard drill duty in the Armed Forces
- *Unemployment compensation
- Net receipts from non-farm self-employment (receipts from a person's own unincorporated business, professional enterprise, or partnership, after deductions for business expense)
- Net receipts from farm self-employment (receipts from a farm which one operates as an owner, renter, or sharecropper, after deductions for farm operating expenses)
- Regular payments from railroad retirement, strike benefits from union funds, worker's compensation, and training stipends
- Alimony (excludes one-time property settlements)
- *Child support payments
- Financial assistance from outside of the household – regular payments received from non-household members or absent family members (excludes gifts or sporadic assistance)
- Pensions, whether private or government employee (including military retirement pay)
- *Social Security Old Age and Survivors' Insurance (OASI) benefit payments received under Section 202 of the Social Security Act
- Regular insurance or annuity payments
- Accident, health and casualty insurance proceeds, unless lump sum
- College or university scholarships (not needs-based), grants (excluding Pell grants), fellowships, and assistantships
- Dividends, interest, net rental income, net royalties, periodic receipts from estates or trusts
- Net gambling or lottery winnings
- Social Security Disability Insurance (SSDI) payments
- Terminal leave pay, severance pay or a cash out of accrued vacation leave
- Disaster Relief Employment wages
- On-the-Job Training (OJT) wages
- IRA Withdrawals that are taxable by the United States Revenue Services

Effective March 9, 2017 v1.1



Professional Development

americanjobcenter

Excludable Income Per State Policy

Not Included in Family Income

- Payments received under the Trade Readjustment Act (TRA) of 1974, and subsequent amendments
- Needs-based scholarship assistance
- Financial assistance under Title IV of the Higher Education Act (i.e., Pell Grants, Federal Supplemental Educational Opportunity Grants and Federal Work Study)
- Cash welfare payments under a Federal, State or local income-based public assistance program (e.g., Temporary Assistance for Needy Families (TANF), Supplemental Security Income (SSI), Refugee Cash Assistance (RCA), General Assistance (GA), Emergency Assistance), and non-federally funded general assistance or general relief money payments)
- Foster child care payments
- Adoption subsidies
- Jury duty pay
- Indian judgment funds distributed as per capita payments to members of Indian tribes
- Non-cash benefits such as employer-paid or union-paid fringe benefits, food or housing received in lieu of wages
- Medicare, Medicaid, food stamps, school meals, and housing assistance
- Any assets drawn down as withdrawals from a bank, sale of a home, property or car
- Capital gains
- Allowances received while serving on active duty (cost of living, overseas cost of living, clothing, dislocation, housing, overseas housing, travel, per diem, and subsistence)
- Military family allotments (voluntary/automatic deduction from military member's paycheck which is sent home to family members)
- Payments and allowances received under Title 38, including the following Chapters (i.e., payment and allowances received while serving on active military duty, compensation for service-connected disability, compensation for service-connected death, duty pay for reservists called to active military duty)
 - Chapter 11 – Compensation for Service-Connected Disability or Death
 - Chapter 13 – Dependency and Indemnity Compensation for Service-Connected Deaths
 - Chapter 30 – All-Volunteer Force Educational Assistance Program
 - Chapter 31 – Training and Rehabilitation for Veterans with Service-Connected Disability
 - Chapter 33 – Post-9/11 G.I. Bill
 - Chapter 35 – Survivors' and Dependents' Educational Assistance
 - Chapter 36 – Administration of Educational Benefits
 (Note: Any future Veterans Educational Benefits should be excluded, as well.)
- Tax refunds, gifts, loans lump-sum inheritances, one-time insurance payments, or compensation for injury
- Allowances, earnings and payments to individuals participating in WIOA programs (except On-the-Job Training wages)
- IRA withdrawals (non-taxed by the United States Revenue Service)
- Cash payments under Title V of the Older Americans Act
- Job Corps payments, or readjustment allowances issued when Job Corps participant leaves program

- Stipends received in the following programs: VISTA, Peace Corps, Foster Grandparents Program, Retired Senior Volunteer Program, and the YouthWorks/AmeriCorps Program
- National Flood Insurance payments
- The value of food and fuel produced and consumed on farms
- The value of assistance received under the Child Nutrition Act of 1966
- The imputed value of rent from owner occupied non-farm or farm housing (i.e., rental value)
- Lump sum, unearned income
- Black Lung payments received under the Benefits Reform Act of 1977
- Payments to crime victims
- Agent Orange Settlement Fund payments
- Reverse mortgage payments
- HUD rental assistance subsidies
- Improvements on a principle place of dwelling under various governmentally funded programs

Note 1: When a federal statute specifically provides that income or payments received under such statute shall be excluded in determining eligibility for the level of benefits received under any other federal statute, such income or payments shall be excluded in WIOA eligibility determination.

Note 2: Any income source NOT included on the exclusions list of income sources should be interpreted as being an inclusion of the income source.

Note 3: Items with an * were added to the Included in Family Income following issuance of WIOA and further clarified in USDOL-ETA Training and Employment Guidance Letters 19-16 and 21-16.

Family Income Calculation

- After the entire family's income has been loaded into the "Income Calculation" screen, the Career Coach must "Calculate Totals"
- For the income calculation, the Career Coach would be responsible for having the income verification documentation for everyone in the family that had income

Over Family Income

If a client does not meet any of the automatic Low-Income qualification factors and is over the family Low-Income level, there is a final way Low-Income could be determined

Family of One Due to Disability

The screen to record when a Family of One Due to Disability is the Household and Income tab:

Income Information

 Due to the individuals disability, they Yes No
qualify as a Family of 1:

Low income has already been established based upon previous entries. Family size and income are optional.

Family Size:

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Family Size Verification

- Birth Certificate
- Current Tax Return w/IRS Documents (See Appendix A)
- Decree of court
- Disabled (See Individuals with Disabilities)
- Divorce Decree
- Landlord Statement
- Lease
- Marriage Certificate
- Medical Card
- Public assistance / Social Service Records
- Public Notice of Closing
- Signed applicant statement
- Statement from Individual Providing Temporary Residence
- Statement from Publicly Supported Facility or Institution

Annualized Family Income (last 6 months X2): 0.00

Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

Family Income Verification

- Pay stubs
- Alimony agreement
- Bank statements
- Business or Farm financial records
- Compensation award letter
- Court award letter
- Employer Statement/Verification
- Housing authority verification
- Pension/Annuity Statement
- Public assistance records
- Quarterly estimated tax for self-employed persons (Schedule C)
- Social Security Benefits
- Unemployment insurance documents and/or printout
- Veterans Administration Award Letter
- Signed applicant statement

Family of One due to a Disability

If an individual with a disability whose own income does not exceed the higher of:

- The poverty line; or Seventy percent (70%) of the lower living standard income level, but who is a member of a family whose income does not meet this requirement

Family of One due to a Disability

- The client must have a documented disability recorded within their WIOA application
- The client's income for the six months prior to application date must be recorded on the "Income Calculation" screen
 - If the client does not have income in the previous six months, the client must write an attestation stating they have not had income in the previous 6-month period
 - As mentioned previously, if the client is age 18 or older, and claims no income earned, then an IBIS statement must be ran to support the claim of no income



Family of One due to a Disability

If the client has income, it must be at or under the income for a family of one (\$14,580) as described in WIOA Notice 22-NOT-01, Revised Income Guidelines for Determining Low-Income Status for WIOA

Family of One due to a Disability

Q - 17-year-old Holly is applying for the In-School Youth Program, she lives with her parents and their family income is above the Low-Income criteria guidelines. However, one of Holly's barriers is a disability due to a hearing impairment. Her own income is less than the family of one income criteria so she will meet the Low-Income criteria of family of one due to a disability. Would a self-attestation be acceptable documentation to support her disability?

Family of One due to a Disability

Q - 17-year-old Holly is applying for the In-School Youth Program, she lives with her parents and their family income is above the Low-Income criteria guidelines. However, one of Holly's barriers is a disability due to a hearing impairment. Her own income is less than the family of one income criteria so she will meet the Low-Income criteria of family of one due to a disability. Would a self-attestation be acceptable documentation to support her disability?

A – No, a self-attestation for the disability is not an acceptable documentation choice under these circumstances due to the client is utilizing family of one due to a disability to support her Low-Income criteria.

Additional Clarification on Question about Documentation

- In instances where a Youth client has multiple barriers that support eligibility; and the Low-Income determination of the individual is not based on family of one due to a disability; the formal documentation for the disability is not required and a self-attestation for the disability could then be used
- The thought is to be less intrusive regarding the individual's documentation of the disability, since the client would have other barriers to support their eligibility beyond just the disability

Question about Family of One due to a Disability

Q - If a client has a disability, should “Family of One due to a Disability” always be used to determine WIOA low-income status for the individual?

Answer about Family of One due to a Disability Question

Q - If a client has a disability, should “Family of One due to a Disability” always be used to determine WIOA low-income status for the individual?

A - No, “Family of One due to a Disability” should only be used in instances when a client would not meet WIOA Low Income criteria by any other way, but when the client who has a disability, and their own income is below the income threshold for a family size of one. (Currently at \$14,580).

Low-Income Individual

Of the eight ways an individual can be determined to be Low-Income for WIOA, there are six ways that do not require capturing income information on the customer and/or the customer's family



WIOA Low-Income Criteria that does not require income calculation

1. Cash Welfare
2. Food Stamps
3. Homeless
4. Free or Reduced Priced Lunch
5. Foster Child
6. Youth Customer Living in a High Poverty Area

Doesn't Meet Automatic Qualification Criteria

If a client does not meet one of the previous six automatic qualification factors that is when an income calculation should be utilized to determine Low-Income status

WIOA Low-Income Eligibility

All determinations of Low-Income status for customers must be supported by proper documentation of the qualifying condition as outlined in the “WIOA Title IB General and Fund Source Eligibility Requirements and Documentation Sources”

Recap

This presentation covered the following items:

- The eight (8) different ways an individual could meet WIOA Low-Income criteria
- Where the WIOA Low-Income criteria is recorded within the Career Connect application
- How the eligibility documentation must be provided to support the WIOA Low-Income eligibility indicated within the Career Connect application

Questions

- This concludes the presentation on WIOA Low-Income
- Please contact your Regional Manager or Project Coordinator for any questions