Self-Report Income Procedure

Background

For the purpose of accurately reporting the number of low-income customers served under WIOA, delegate agencies must capture income for all participants in both the WIOA application and the file. This Self-Report Income Worksheet Procedure explains:

- the scenarios when staff may use self-reported income;
- how to enter self-reported income in Career Connect; and
- how to document self-reported income in the customer file.

Navigation

Unless otherwise noted below, income must be recorded in the Career Connect WIOA Application (Staff Profile > Case Management Profile > Programs > WIOA Application) on the *Family Income Worksheet* and the *Family Income* pages.

Procedures (Updates in red)

1. Self-reported income **may ONLY be used in one of the following eligibility scenarios** where income is not required for eligibility:
    a. Adult who is Basic Skills Deficient
        o Basic Skills Deficient and over income.
        o Basic Skills Deficient and is not currently employed. *Please note, if a customer is currently employed, check stubs are required along with an income calculation.*
    b. Dislocated Worker
    c. Out-of-School Youth that has one or more of the following Applicable Barriers:
        o School dropout
        o Within compulsory age to attend school, but has not attended for at least the last school quarter
        o Subject to the juvenile or adult justice system
        o Homeless
        o In foster care or aged out of foster care
        o Pregnant or parenting;
        o An individual with a disability

    If the customer does not meet one of these scenarios, **staff must document low income** in accordance with the Chicago Cook Workforce Partnership's Local Workforce Innovation and Opportunity Act (WIOA) Policy No. 2016-PL-05 on Low-income Individuals (2016-PL-05). The policy is available on the Career Connect Help Desk website at:
    https://workforceboard.zendesk.com/hc/en-us/articles/115000826671-Low-Income.

2. If a Dislocated Worker or Out-of-School Youth with an applicable barrier meets low-income based on one of the following (as defined in 2016-PL-05), staff may document this in the application and file. In this case, staff does not need to document self-reported income in the Family Income Worksheet because the customer has already been determined low-income.

   - Recipient of SNAP, TANF, or SSI
   - Is homeless
   - Is a foster child (Out-of-School Youth only)
   - Resides in a high poverty area (Out-of-School Youth only)

3. For Dislocated Workers and Out-of-School Youth with an Applicable Barrier that do not meet low-income in step 2 above, staff must record self-reported income as follows:

   a. Have the customer record their family size and family income on the "Self-Reported Income Attestation" form (attached to this procedure), and sign and date the form. The Career Coach should also sign and date the form.

   b. The income from the "Self-Reported Income Attestation" form should be recorded in Career Connect in the *Family Income Worksheet* tab of the WIOA application. Income amounts should be added to the month 6 column.

Family Income Worksheet

Income Worksheet	1	2	3	4	5	6	Total
Wages:	0.00	0.00	0.00	0.00	0.00	9000.00	9000.00
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
Other:	0.00	0.00	0.00	0.00	0.00	0.00	0.00

6 Month Income:**9000.00**
X 2
12 Month Income:**18000.00**

c. On the *Family Income* page enter the Family Size and select "Signed Applicant Statement" as the verification.

d. Verify "Annualized Family Income" (which automatically populates from the Family Income Worksheet screen) by selecting "Signed Applicant Statement".

Family Income

* **Due to the individual's disability, they qualify as a Family of 1:**	○ Yes ● No

Low income has not been established based on previous entries. Therefore, low income will be based on family size and income. Family size and income are required entries.

* **Family Size:**	3 ▼
*	[**Verify**	**Scan**	**Upload**	**Link**] ✔ Signed applicant statement
* **Annualized Family Income:**	$11,200.00
*	[**Verify**	**Scan**	**Upload**	**Link**] ✔ Signed applicant statement
	Income Table

e. Place the completed, signed and dated "Self-Reported Income Worksheet" into the customer's case file under the eligibility documentation section.