

Income Calculation 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 Income Calculation Procedure explains:

- How to determine if an Income Calculation is needed
- How to calculate income
- How to record/document income in Career Connect

Navigation

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

Low-income determination is part of the eligibility process in the following:

1. In the WIOA Youth program, low-income can be a qualified criterion for determining eligibility. Low-Income youth are considered having a barrier to employment.
2. In the WIOA Adult program, Low-income is one of the three priorities of service criteria. Low-Income adults must receive priority of services over Adults who do not meet one of the three priority categories.

An Income Calculation is NOT required for an individual who:

1. Receives or received in the past six (6) months, or is a member of a family that receives or received in the past six (6) months,
 - a. Assistance through the Supplemental Nutrition Assistance Program (SNAP),
 - b. Temporary Assistance for Needy Families (TANF) or
 - c. The Supplemental Security Income (SSI) program, or
 - d. State or local income-based public assistance.
2. Is a homeless individual.
3. Youth Only: Living in a High Poverty Area
4. In-School Youth Only: Free or reduced-price lunch or Foster Child

An Income Calculation IS required for an individual who is currently employed and:

5. Is in a family with a total family income that does not exceed the higher of:
 - a. The poverty line; or
 - b. Seventy (70%) of the lower living standard income level
 - c. Out of School Youth only: A Youth who is a recipient of a secondary school diploma or its recognized equivalent and is basic skills deficient or an English language learner and does not fall in one of the scenarios above.
 - d. Youth only: Youth needing additional assistance and does not fall in one of the scenarios above.

Calculating Income

- The 6-month eligibility period is considered 6 months from the eligibility date. We have a chart that can help you determine that information and can be found here:
LINK: <https://workforceboard.zendesk.com/hc/en-us/articles/360042764312->
- To determine what income is “Includable and Excludable” please use the list that can be found here:
LINK: <https://workforceboard.zendesk.com/hc/en-us/articles/360001562152->
- Please use the Updated Excel Income Calculation Worksheet and complete as it applies to the participant and/or family. All documents must be collected and placed in customer file.

Entering Into Career Connect

Once the Income Calculation Worksheet has been completed the information must be entered into Career Connect.

- a. The income from the “Income Calculation Worksheet” should be recorded in Career Connect in the *Family Income Worksheet* tab of the WIOA application. **Income amounts should be added to the monthly columns. You can do this by dividing the 6-month total from the Excel Income Calculation Worksheet by 6 and enter accordingly.**

Family Income Worksheet

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

Total Annual Income: 12000.00

Income Worksheet	1	2	3	4	5	6	Total
Wages:	1000.00	1000.00	1000.00	1000.00	1000.00	1000.00	6000.00
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: **6000.00**
X 2
12 Month Income: **12000.00**

- b. On the *Family Income* page enter the Family Size and select “Signed Applicant Statement” as the verification.

Income Information

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

* Family Size:

* Verify: [[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]
✓ Signed applicant statement

- c. Verify “Annualized Family Income” (which automatically populates from the Family Income Worksheet screen) by selecting what document was used to verify the participants income.

* Annualized Family Income (last 6 months X2): 3200.00

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

[Income Table](#)

- d. Place the completed, signed and dated “Income Calculation Worksheet” into the customer’s case file under the eligibility documentation section.