



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.

NOTE: *a new UI line has been added to the Family Income Worksheet to capture Unemployment Insurance income in accordance with policy.*

Procedures

1. Self-reported income **may ONLY be used in one the following two eligibility scenarios** (where income is not required for eligibility or priority of service):
 - a. Dislocated Worker
 - b. Out-of-School Youth that has one or more of the following Applicable Barriers:
 - School dropout
 - Within compulsory age to attend school, but has not attended for at least the last school quarter
 - Subject to the juvenile or adult justice system
 - Homeless
 - In foster care or aged out of foster care
 - Pregnant or parenting;
 - An individual with a disability

If the customer does not meet one of these two 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.

NOTE: The Income Worksheet screen now displays a message indicating whether low-income was already established. (See screen shot in #3 below.)

- 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. (**Note the new UI row for capturing Unemployment Insurance income.**)

Family Income Worksheet

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.

Income Worksheet	1	2	3	4	5	6	Total
Wages:	0.00	0.00	0.00	0.00	0.00	18000.00	18000.00
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	3000.00	3000.00
UI Benefits:	0.00	0.00	0.00	0.00	0.00	1580.00	1580.00
Other:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6 Month Income: 22580.00							
X 2							
12 Month Income: 45160.00							

- 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 b:

* **Family Size:**

* [\[Verify | Scan | Upload | Link \]](#)
✔ Signed applicant statement

* **Annualized Family Income (last 6 months X 2):**

* [\[Verify | Scan | Upload | Link \]](#)
✔ 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.

Self-Reported Income Attestation
NOT ALLOWABLE FOR INCOME ELIGIBILITY OR PRIORITY OF SERVICE
DETERMINATION

Please list your family size: _____

In accordance with U.S. Department of Labor guidelines described in TEGL 19-16, for the purposes of calculating income for WIOA eligibility, family size is defined as:

1. *A married couple and dependent children*
2. *A parent(s) or guardian(s) and dependent children*
3. *A married couple*

Please list your income (including Unemployment Insurance, if applicable) for the last six months:

<u>Type of Income</u>	<u>Amount</u>
Wages	\$ _____
Self-Reported Wages	\$ _____
Pension	\$ _____
Insurance Annuity	\$ _____
Alimony	\$ _____
Unemployment Compensation	\$ _____
Other	\$ _____
TOTAL	\$ _____

The above information is accurate to the best of my knowledge.

Participant Name (Printed) *Career Connect User ID #*

Participant Signature *Date*

Career Coach Name (Printed) *Career Coach Office*

Career Coach Signature *Date*