

## Income Documentation

- I. All applicants who are not adjunctively eligible must provide proof of current income. Current income is defined as gross income received by the household during the month (28-31 days) prior to the date of application for WIC benefits.
- II. When a certification appointment is scheduled, clinic staff must tell the applicant that proof of income is required and what documentation is required as proof of income.
- III. Pay statements or other proof of income representing the last 28-31 days of pay; or proof of adjunct (automatic) income eligibility are the preferred forms of income documentation.
  - a. For those applicants who get paid weekly, four pay statements are sufficient; or two pay statements for those who get paid every two weeks or twice a month.
    - i. Individuals claiming to receive regular, consistent earnings, such as those earning a salary, only need to provide one pay statement to sufficiently document income.
    - ii. If this results in the applicant being over the income limit and the applicant indicates the pay was over the usual amount, the applicant must be given the opportunity to provide additional proof of income that most accurately reflects the household's financial circumstances.
  - b. The most recent pay statements the applicant has received should be requested; however, the last full completed month's statements may be accepted. For example, on February 15th the applicant may bring in statements representing pay from January 15th through February 15th, or they may bring all of the statements from January.
  - c. In addition to reviewing pay statements, the clinic staff must ask applicants if there are any other sources of income in the family.
    - i. If the applicant reports receiving additional income from sources such as a relative helping with rent etc. this income should be included with total income, but proofs of these minor sources of income need not be required and may be left blank. Self-declaration of additional income in this type of circumstance is sufficient.
  - b. If pay statements are not reasonably available, other proofs of income may be acceptable. (See Income Types.)
    - i. Acceptable proofs include but are not limited to income tax returns filed for the most recently completed tax year. These are most commonly used for the self-employed, households with fluctuating

- income and households with various sources of non-wage income. Tax returns are the standard documentation of annual income.
- ii. Clinic staff must determine what proofs of income most accurately reflect the applicant's current income.
- c. Documentation of income should not be copied or scanned and should be returned to the applicant.
  - d. Applicants are expected to provide documentation to confirm income and/or participation in an assistance program. Online or internet documentation should be accepted when the client is able to show pay statements, bank statement, etc. on a computer or other electronic device. Pictures and scans of proof documents should be allowed unless there is evidence or reasonable suspicion of tampering.
  - e. When the applicant has difficulty obtaining proof of income, a local clinic can confirm that the applicant receives such benefits and/or income by telephone contact to the appropriate source, with prior approval from the applicant.
  - f. If the validity of the income documentation provided or statements made by the client is in question, clinic staff is authorized to verify income using available methods.
- II. In the income screen in VISION, add a row for each different source of income in the household, including each job.
- a. The "source" field refers to how the household earns the income. The drop-down list offers several choices for income sources, each of which are considered to be income under WIC definitions. Each job is separate source.
  - b. The "proof" field documents how the applicant proved income eligibility. This could be items such as pay statements, letter from employer etc.
  - c. The "amount" field refers to the amount of income earned from each source. This must be determined from the pay statements or other proof provided.
    - i. In the amount field, the amount entered should be the average of the pay statements provided for that job if the amounts are different. For example; if an applicant who is paid every two weeks brought in two pay statements, showing amounts of \$500 and \$700 the amount entered would be \$600 (the average of the two checks). The pay period would be input as bi-weekly.
    - ii. Staff CANNOT simply add the pay statements together and enter the total as "monthly" income.

- iii. Enter exact amounts, do not round.
- iv. The income calculator app in VISION (green and gold icon) should be used to average the pay statements that are provided.
  - 1. Using the correct tab for the frequency of pay, enter the gross income amount of each pay statement into the income calculator app. It will compute an average income for that income source and automatically populate the amount field upon closing the calculator app.
  - 2. Use of a separate calculator outside of VISION is discouraged.
- d. The “period” refers to the frequency the income is received. Income should be entered based on the correct frequency of pay.
  - i. Weekly income is defined as income received once per week (52 pay periods per year).
  - ii. Bi-Weekly income is defined as income received every two weeks (26 pay periods per year).
  - iii. Twice Monthly income is defined as income received two times each month (24 pay periods per year).
  - iv. Monthly income is defined as income being received once per month (12 pay periods per year).
  - v. Annual income is a total of all yearly income.
- e. The “note” section may be used to explain any entry. This is helpful to comment on such things as “dad’s job” or “mom’s business income”.
- f. The system will compare the income entered to the income guideline which matches the frequency of pay. If more than one income row is entered with different frequencies of pay, the system will automatically convert the income amounts to annual equivalents and add all income sources together to give a total annual income amount to determine eligibility.
- g. Click on the “Check Income Eligibility” button in order to determine the income eligibility of each household member applying for benefits.
  - i. Family members who are eligible will be listed in the upper box.
  - ii. If family members are ineligible, they will be listed in the “Not to be served at this time” box.
    - 1. If you find that the family is not income eligible, have a second staff person or a supervisor check the income record for any mistakes.
    - 2. If the record was completed correctly and they are found not eligible, mark the “Action” boxes for each family member listed so that the system will change their status to ineligible or terminate their current certification.

3. Follow policy to provide notification to the client and document it (see *Ineligible Applicants* and *Termination* policy sections).
- III. Foster Children are a separate economic unit with a household size of 1. Income and adjunct eligibility records are separate from any other family applicants. If the foster child does not have proof of adjunct eligibility, an income record can be added and the income proof would be the foster letter. If the foster letter indicates that the child has no income, a "0" (zero) may be entered as the income amount. The Signed Statement form does not need to be completed.