

Income Determination & Documentation Worksheet

Directions: After viewing the Income Determination & Documentation training, utilize the following examples to apply the information. For each example, determine income and document the applicant's Economic unit & Income on the 'Income Eligibility' section of the Certification form provided.

Example # 1:

Sandy comes in to get her 12 month old and 3 ½ year old on the program as they recently qualified for SNAP. She is as a single mother of 2 and was told they could get WIC too. Staff informed Sandy of how to access the website link (EBT/SNAP link) to indicate they are currently receiving SNAP benefits. Upon staff seeing the SNAP screen and that they are receiving benefits monthly, staff proceeds to inquire about Sandy's income to obtain a verbally declared annual income. Sandy shared she works a part-time job and makes about \$300 every 2 weeks.

Economic Unit: _____

Adjunct Eligibility	Current Check Stub	Gross Income	Other	No Income (explain)
	1 st Income	<input type="checkbox"/> 2 nd Income	Source	
<u>Assistance Type</u> <u>Active</u>		<input type="checkbox"/> No 2 nd Income Declared		
Medicaid <input type="checkbox"/>	Gross Income Amount	_____		
*SNAP <input type="checkbox"/>	X Frequency	_____		
TANF <input type="checkbox"/>		_____		
<i>*Benefits are not included as income</i>	= Calculated Amount	\$ _____	Amount \$	
Total Annual Income: \$ _____				
Determined by <input type="checkbox"/> Calculated Income OR <input type="checkbox"/> Verbally Declared Income				

Example # 2:

Jessica recently had a pregnancy test at the clinic and was scheduled for WIC. At her WIC appointment she presented her most recent check stub. She states she lives alone and is not involved with the father of the baby. Her check stub indicated a gross amount of \$658.00 and she shared she gets paid twice a month.

Economic Unit: _____

Adjunct Eligibility	Current Check Stub	Gross Income	Other	No Income (explain)
	1 st Income	<input type="checkbox"/> 2 nd Income	Source	
<u>Assistance Type</u> <u>Active</u>		<input type="checkbox"/> No 2 nd Income Declared		
Medicaid <input type="checkbox"/>	Gross Income Amount	_____		
*SNAP <input type="checkbox"/>	X Frequency	_____		
TANF <input type="checkbox"/>		_____		
<i>*Benefits are not included as income</i>	= Calculated Amount	\$ _____	Amount \$	
Total Annual Income: \$ _____				
Determined by <input type="checkbox"/> Calculated Income OR <input type="checkbox"/> Verbally Declared Income				

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Example # 3:

Missy a pregnant teenager is living at home with her 2 siblings and her parents (who are both employed). Missy works a part-time job after school; her income is \$50 a week. Upon asking Missy questions to determine her economic unit site using the "Assessing Separate Households" it was determined Missy is not a separate household, she is supported by her parents. Upon returning with her parents check stubs; her dad makes \$2600 every month and her mom makes \$1000 every 2 weeks.

Economic Unit: _____

Adjunct Eligibility	Current Check Stub	Gross Income	Other	No Income (explain)
		1 st Income <input type="checkbox"/>	2 nd Income <input type="checkbox"/>	Source
<u>Assistance Type</u> <u>Active</u>		<input type="checkbox"/>	No 2 nd Income Declared	
Medicaid <input type="checkbox"/>				
*SNAP <input type="checkbox"/>	Gross Income Amount _____			
TANF <input type="checkbox"/>	X Frequency _____			
<i>*Benefits are not included as income</i>	= Calculated Amount \$ _____			
Total Annual Income:	\$ _____	Determined by <input type="checkbox"/>	Calculated Income OR <input type="checkbox"/>	Verbally Declared Income

Example # 4:

Harry's wife Sally comes to the office with their two year old son for certification. Sally is not working but states that Harry works odd jobs for cash so he has no check stub or employer statement to present. She states that he makes roughly \$1800 per month.

Economic Unit: _____

Adjunct Eligibility	Current Check Stub	Gross Income	Other	No Income (explain)
		1 st Income <input type="checkbox"/>	2 nd Income <input type="checkbox"/>	Source
<u>Assistance Type</u> <u>Active</u>		<input type="checkbox"/>	No 2 nd Income Declared	
Medicaid <input type="checkbox"/>				
*SNAP <input type="checkbox"/>	Gross Income Amount _____			
TANF <input type="checkbox"/>	X Frequency _____			
<i>*Benefits are not included as income</i>	= Calculated Amount \$ _____			
Total Annual Income:	\$ _____	Determined by <input type="checkbox"/>	Calculated Income OR <input type="checkbox"/>	Verbally Declared Income

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Example # 5:

Jennifer is a breastfeeding mom with a new baby and a toddler. She left her husband due to the abusive living situation and is currently staying with her mom, sister and her sister's kids. In the past week, she applied for SNAP and is not identified as an active case yet. As part of the certification process, staff determined that she was her own economic unit. Upon asking about how much she is supported by her family members, she states she would estimate a value of \$150 per month.

Economic Unit: _____

Adjunct Eligibility	Current Check Stub	Gross Income	Other	No Income (explain)
		1 st Income <input type="checkbox"/>	2 nd Income <input type="checkbox"/>	Source
<u>Assistance Type</u> <u>Active</u>		<input type="checkbox"/>	No 2 nd Income Declared	
Medicaid <input type="checkbox"/>				
*SNAP <input type="checkbox"/>	Gross Income Amount _____			
TANF <input type="checkbox"/>	X Frequency _____			
<i>*Benefits are not included as income</i>	= Calculated Amount \$ _____			
Total Annual Income:	\$ _____	Determined by <input type="checkbox"/>	Calculated Income OR <input type="checkbox"/>	Verbally Declared Income