

## **TIP SHEET - What documents should be submitted for income verification?**

The following information has been created to better assist persons applying for Weatherization Assistance in determining the documentation they must provide to Combined Community Action (CCA) Weatherization Assistance Program (WAP) in order to be considered income eligible for the Weatherization Program. Incomplete or incorrect documentation will delay your application or annual recertification for the Weatherization Program and could cause repayment of weatherization services to the Texas Department of Housing and Community Affairs (TDHCA) if income verification provided is inaccurate.

**Who is considered a household member?** All persons, regardless of age, residing in the home should be included on your application, including birthdates for all members.

**Who must submit income documentation?** The Texas Administrative Code, TAC RULE §5.19, lists all individual's living in your Household who are eighteen (18) years of age or older, must provide documentation/verification of their income.

**What is Income?** The Texas Administrative Code, RULE §5.19 describes income as "cash receipts earned and/or received by the applicant *before* taxes during an applicable tax year." These receipts may be in the form of Earned or Unearned Income. The Department of Energy, WEATHERIZATION PROGRAM NOTICE 16-3 Section B states the following as cash receipts notated as income that must be reported to determine eligibility.

1. Money, wages and salaries before any deductions;
2. Net receipts from non-farm or farm self-employment (receipts from a person's own business or from an owned or rented farm after deductions for business or farm expenses);
3. Regular payments from social security, railroad retirement, unemployment compensation, strike benefits from union funds, worker's compensation, veteran's payments, training stipends, alimony, and military family allotments;
4. Private pensions, government employee pensions (including military retirement pay), and regular insurance or annuity payments;
5. Dividends and/or interest;
6. Net rental income and net royalties;
7. Periodic receipts from estates or trusts; and
8. Net gambling or lottery winnings.

**What time period is used to determine what is submitted?** The entire 30 day period, *prior* to the date of application or recertification must be submitted.

**What if I have no income or no documented proof?** After all other avenues of documenting income eligibility are exhausted, self-certification is allowable per WEATHERIZATION PROGRAM NOTICE 16-3 Section D, Proof of Eligibility # 3. However, evidence of the various attempts at proving eligibility must be documented, including a notarized *Declaration of Income Statement* signed by the potential applicant indicating that they have no other proof of income. TAC RULE §5.19 states that certain circumstances, such as a crisis situation due to a natural disaster limiting accessibility to your home and documents, applicants whom left their residence due to an abusive situation or due to recent household member deceased, may submit the *Declaration of Income Statement*, which is attached to the application or can be found on line at [www.ccaaction.com](http://www.ccaaction.com). The DIS must be notarized in all situations when the application or recertification is submitted.

For example, Mark applies on 06/22/2016. Kelly's Sporting Goods, the company Mark works for pays him every two weeks. Mark must submit copies of his gross earnings (paystub/printout from employer) for the *30 days prior* to application date of 6/22/2016. Mark's wife Trish is disabled and receives disability from Government disability programs. Mark will also need to submit Trish's Disability Award Letter for 2016. Mark and Trish's daughter Karen is 18 years old and a Sr. in High School. Since Karen is 18, but is a full time student who is not employed, Mark must submit the *Declaration of Income* and indicate Karen has zero income due to her being a full time high school student. This form must be notarized when submitting as verification.

Do not provide your current filed Income Tax statement. This is not acceptable proof as it encompasses the previous year's earnings rendering it non-current as policy requires documentation to be within the 30 days prior to the date of application or recertification.

**What are the current income guidelines?** The 2016 POVERTY INCOME GUIDELINES, effective January 25<sup>th</sup>, 2016 are the current guidelines that CCA uses to establish income eligibility. Gross income, prior to deductions, is used in determining all income for eligibility.

**Do I need to recertify if it has been more than 12 months since I have applied and I am currently on the waiting list?** The Department of Energy, WEATHERIZATION PROGRAM NOTICE 16-3 Section G states: An applicant must be re-certified when eligibility lapses due to the length of time the applicant was waiting to receive Weatherization services. Re-certification of eligibility must occur at least every 12 months.

