

HOME ENERGY ASSISTANCE PROGRAM (HEAP/Fuel Assistance)

**INCOME WORKSHEET INSTRUCTIONS**

- 1. CAAs are required to complete the Income Worksheet to document countable and excluded income for all Household members, unless the person is a college student who will be excluded from the Household.
- 2. The Income Worksheet is a worksheet for Agency Use Only, completed by the CAA staff during Intake, and signed by the certifier.
- 3. All countable income must be calculated on a previous one (1) month or thirty (30) days income verification period for standard HEAP Applications.

Example:		
Date of Application	Income Verification Period	Proof of income required for:
December 14, 2023	1 month	November 2023
December 14, 2023	30 days	November 14, 2023 to December 13, 2023

- 4. CAA will calculate the Household's countable income received during the requested income verification period. **Do not use** the pay period date as this only indicates when the income was earned and not when the Household did receive the income.
- 5. Refer to Handbook, Section 23 – Countable Income for all income types.

**INTAKE WILL COMPLETE THE FOLLOWING**

- (1) Primary Applicant Name.
- (2) Client Number.
- (3) Intake / Created Date. Enter Intake Date for Online Submitted applications. Enter Created Date for applications taken over the phone or face to face.
- (4) Check the appropriate box for the Income Verification Period.
- (5) "From" and "To" dates for the previous 30 Days or the month of the Income Verification Period.
- (6) Check the appropriate box if the household is Subsidized with Heat Included, TANF Categorically Income Eligible, or SNAP Categorically Income Eligible.
- (7) Indicate Income Type the Household receives. Include the name of the Household member receiving the income, the frequency of income (monthly, bi-weekly, etc.), and the employer.
- (8) If an Applicant claims to have had "**Zero Income**" during the income verification period, record the adult Household member's name and the reason for zero income. Identify if the adult household member is a full-time student by entering Y or N. Enter the school that the student is attending in the reason for zero income.
- (9) If an Applicant claims that the Household has zero/minimal income for the income verification period, document how the Household is paying for basic living expenses. Income that is exempt is self-attestation. **Any countable income disclosed and not previously documented must be included, documented in the appropriate spaces (Amount and Certified Income Amount columns) and proof provided by the applicant. If income is exempt, place the amount of income in the Amount column and place zero (0) in the Certified Income Amount column. Refer to Handbook Section 22 and Section 23 for exempt and countable income.**
- (10) Court ordered child support paid by a Household member. If an Applicant claims to pay child support, the amount paid and documented during the income verification period may be deducted from the Household's income.
  - a. Record the name of the Household member who is paying the child support payments.

- b. Enter Y or N if the child support is court ordered.
- c. Record the total amount of child support due and paid.
- d. Enter the frequency the child support is paid.
- e. If the amount paid is greater than the Applicant's income, the intake worker will ask the Primary Applicant about the source of funds used to make the child support payments during the income verification period. The intake worker will add notes to the Income Worksheet explaining who/how paid.

(11) Under the "NOTES", document all information pertinent to Household income. Include information such as why some adult members do not have any income, if rental property is not rented and why, etc. Detailed information provided on the Worksheet will assist the certifier in answering any questions they may have about Household income. A separate blank sheet will need to be attached if there is not enough space to document everything in "NOTES".

(12) Make copies of all proof of income and documentation brought in by the Primary Applicant. Attach documents to the Worksheet.

(13) Complete the Reminder Form to indicate what (if any) additional income documentation is required.

### CERTIFIER WILL

- (1) Confirm that income (or lack of income) for all applicants is documented on the Worksheet.
- (2) Confirm there is back-up documentation (paystubs, SS award letters, tax forms, etc.) for each type of income listed on the Income Worksheet and the documentation is adequate for the income verification period.

**Example:**

Date of Application is 12/12/yyyy.  
 Applicant is paid on a weekly basis.  
 Income verification period is 1 month (November).  
 The file would need to have either:

- A paystub for each week paid during the one (1) month income verification period;  
**or**
- If the paystub contains the year-to-date income, the file would need the first paystub in November and the last paystub in November.

- (3) Calculate the amount of gross income by (income) type for the applicable income verification period. Record the total gross income in the Certified Income Amount column according to the income verification period – i.e. 30 days or 1 month.
- (4) Court ordered child support paid by a Household member. If a lump sum payment is made for arrears, it cannot be deducted from income. Only deduct the amount that applies to the income verification period. The certifier must verify whether any current child support was part of the lump sum payment for the income verification period.
- (5) Certifier signs and dates the Income Worksheet.

### A. SELF EMPLOYMENT REMINDERS

- (1) If a Household has both self-employment and non-self-employment income, all income must be documented for the same income verification period.
- (2) If the Primary Applicant chooses the one (1) month income verification period, self-employment income is to be documented for twelve (12) months and divided by 12 and other Household income would be documented for the previous one (1) month.

- (3) Self-employment income, including rental income, must be documented by a federal tax return, or the Self-Employment Worksheet accompanied by business records. Additional information about self-employment income and the requirements can be found in the following:
- a. Handbook: Section 23- Countable Income.
  - b. Self-Employment Worksheet instructions.