

**SELF-EMPLOYMENT WORKSHEET INSTRUCTIONS**

1. An Applicant must complete a Self-Employment Worksheet and provide supporting documentation to substantiate self-employment for the twelve (12) calendar month period preceding the Application Create Date- Non Online/Application Intake if an Applicant’s self-employment income cannot be documented by a federal tax return for the most recent or previous calendar year.
2. Examples of situations where a self-employed Applicant would be required to complete a Worksheet:
  - a. Applicant does not file a tax return for self-employment income.
  - b. Self-employed Applicant is not required to file a tax return per IRS guidelines.
  - c. Applicant is newly self-employed and has not yet filed a tax return for his/her business or rental income.
  - d. Applicant’s rental income cannot be documented by a federal tax return for the most recent or previous calendar year.
  - e. Self-employed Applicant provides IRS documentation that is incomplete or ambiguous. In such cases, the Applicant’s income would be based on the gross amount of their self-employment and/or rental earnings minus business expenses.
3. Supporting documentation for the twelve (12) calendar month period preceding the Application Create Date- Non Online/Application Intake must be provided to substantiate the gross amount of self-employment and/or rental earnings declared on the Worksheet. Cash receipts, bank statements, business journals, ledgers, and/or accountant’s records may be used to verify self-employment and rental income. If the Applicant does not provide adequate supporting documentation, the Application will be denied.
4. Households will use the one (1) month income verification period, and self-employment and/or rental income for the twelve (12) calendar month period preceding the Application Create Date- Non Online/Application Intake will be divided by twelve (12) to prorate to one (1) month.

**5. COMPLETING THE SELF-EMPLOYMENT WORKSHEET**

<b>A. INTAKE WORKER COMPLETES</b>					
(1)	CAA’s (Agency) name, address, phone number, fax number, and email				
(2)	Primary Applicant’s name				
(3)	Create/Intake Date				
(4)	Client ID #				
(5)	Name of Applicant with self-employment and/or rental income				
(6)	Description of business or trade				
(7)	Date business started				
(8)	If business is located in Applicant’s dwelling, indicate the number of rooms used for the business.				
(9)	Period covered by the Income Worksheet (from/to dates)				
<b>Examples:</b>					
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="width: 50%; text-align: left; padding: 2px;">Create/Intake Date</th> <th style="width: 50%; text-align: left; padding: 2px;">12 Calendar Month Period Covered</th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;">December 15, 2023</td> <td style="padding: 2px;">December 2022 to November 2023</td> </tr> </tbody> </table>	Create/Intake Date	12 Calendar Month Period Covered	December 15, 2023	December 2022 to November 2023
Create/Intake Date	12 Calendar Month Period Covered				
December 15, 2023	December 2022 to November 2023				
(10)	Enter the applicable “Month / Year” in each column. Be sure to include all months during the twelve (12) calendar month period preceding the Application Create Date- Non Online/Application Intake Date.				
<b>Example:</b>					
Create/Intake Date: December 15, 2023 Twelve (12) calendar month period covered: December 2022 to November 2023. The gross amount of self-employment income received between 12/1/2022 and 11/30/2023 must be documented as month / year received.					

**B. APPLICANT/BUSINESS OWNER COMPLETES**

- (1) For all self-employment and/or rental income:
  - a. Gross amount earned each month/year. Include the amount received for goods and/or services. Applicant must provide proof of their gross receipts or sales, i.e. cash receipts, journal, ledger, bank statements, accountant's records, etc. If the gross amount earned for a month is zero, the Applicant must enter zero (0).
  - b. Enter the total gross amount for the twelve (12) calendar month period preceding the Application Create Date- Non Online/Application Intake Date.
- (2) Applicant/Business Owner signs and dates to certify the information is true, correct, and complete to the best of his/her knowledge.

**C. CERTIFIER WILL**

- (1) Review and verify the completed/signed Worksheet to ensure it is complete and correct.
- (2) Verify the total gross self-employment income recorded on the Worksheet is correct and consistent with supporting documentation provided by the Applicant.
- (3) Will request additional documentation from the Applicant as necessary to resolve any inconsistencies prior to certifying the Application.
- (4) Divide the gross self-employment/rental income for the twelve (12) calendar month period preceding the Application Create Date- Non Online/Application Intake Date by twelve (12) to prorate to one month.
- (5) Record the gross self-employment income onto the Income Worksheet and enter the gross self-employment income into HEAP Cloud to document the Applicant's self-employment income.