

Workforce Innovation and Opportunity Act Family Size/Family Income

The purpose of this form is to document information that verifies the WIOA applicant's family size at the time of registration and family income during the last six (6) months (26 weeks). This entails verifying the size and makeup of the applicant's family. This form is only applicable when eligibility is based on family income.

The applicant should complete the Statement of Family Size/Family Income form with the assistance of WIOA intake staff to ensure it is completed correctly. The applicant will then take the form to have it signed by a witness who can corroborate the given information.

Family – Two or more persons related by blood, marriage or decree of court, who are living in a single residence and are included in one or more of the following categories:

- A. A husband, wife and dependent children.
- B. A parent or guardian and dependent children.
- C. A husband and wife.

Dependent Child – is defined as:

- A. Under age 19 at the end of the previous calendar year, or
- B. Under age 24 at the end of the previous calendar year and was a student.
 - a. A dependent child was a student if he/she was enrolled as a full-time student at a school during any 5 months of the previous calendar year or took a full-time, on farm training course during any 5 months of the previous calendar year. The course had to be given by a school or a state, county or local government agency. A school includes technical, trade and mechanical schools. It does not include on-the-job training courses or correspondence schools.

In applying the definition of family, runaway youth, emancipated youth and court adjudicated youth separated from the family through involuntary temporary residence elsewhere (e.g. institutionalized, incarcerated or placed as a result of court order) shall not be classified as dependent children.

A disabled youth, whose family does not meet the income criteria, is considered low-income if the youth's own income, separate from the household's meets the income eligibility guidelines.

Family Income – For the purposes of determining WIOA income eligibility, list the total income received by you and members of your family from {1} gross wages and salaries (before deductions); {2} net self-employment income (gross receipts minus operating expenses); {3} other money income from sources such as net rents, social security, pensions, alimony, government and armed forces retirement payments, insurance policy annuities and other sources of periodic income.

Inclusions for Family Income

1. Gross wages and salaries before deductions: Total money earnings received from work performed as an employee. If a family's only source of income was from wages and salary payments, family income would be equal to gross wages and salary received.

2. Income from non-farm self-employment: Net income (gross receipts minus operating expenses) from a business or other non-farm enterprise in which a person is engaged on his/her own account. If the business or enterprise has suffered a loss, this loss will be allowed to offset wage earnings.
3. Income from farm self-employment: Net receipts from farm self-employment (receipts from a farm which operates as an owner, renter or sharecropper, after deductions for farm operating expenses). If the farm has suffered a loss, this loss will be allowed to offset wage earnings. Money received under the Agricultural Crop Stabilization Program is considered income.
4. WIOA and Title V Older Americans Act Program Participation: Wages paid to participants in WIOA OJT and Title V Older Americans Program placements count as income.
5. Social Security Disability Insurance (SSDI): Benefits to you and certain members of your family if you are "insured" meaning that you worked long enough and paid Social Security taxes.
6. Money received from such sources:
 - Net rents
 - Governmental and non-governmental pensions
 - Railroad retirement benefits
 - Strike benefits from union funds
 - Worker's compensation
 - Training stipends
 - Alimony
 - Military family allotments or other regular support from an absent family member or someone not living in the household (except for military payments indicated below which are excluded from family income calculations)
 - Regular insurance or annuity payments
 - College or university scholarships, grants (excluding Pell grants), fellowships and assistantships
 - Dividends and interest
 - Net royalties
 - Periodic receipts from estates and trusts
 - Net gambling or lottery winnings
7. Unemployment compensation
8. Child support payments

Exclusions for Family Income

1. **Old age and survivors' insurance benefits received under section 202 of the Social Security Act (42 U.S.C. 402)**
2. **Military pay or allowances:** Are there special rules that apply to veterans when income is a factor in eligibility determinations? (Sec. 667.255) Yes, under 38 U.S.C. 4213, when past income is an eligibility determinant for federal employment or training programs, any amounts received

as military pay or allowances by any person who served on active duty, and certain other specified benefits must be disregarded.

3. **Federal non-cash benefits such as:** Medicare, Medicaid, Food Stamps, school lunches and housing assistance
4. **Capital gains and losses**
5. **Assets drawn down as withdrawals from a bank**
6. **Public assistance payments:** Payments received under Temporary Assistance for Needy Families (TANF), Supplemental Security Income (SSI), General Assistance and Refugee Cash Assistance
7. **The sale of property, house or an automobile**
8. **Tax refunds**
9. **One-time gifts**
10. **Loans**
11. **Lump-sum inheritances**
12. **One-time insurance payments or compensation for injury**
13. **Cash value of employer-paid or union-paid portion of health insurance or other employee fringe benefits**
14. **Cash value of food or housing received in lieu of wages**
15. **Cash value of food and fuel produced and consumed on farms**
16. **Imputed value of rent from owner-occupied non-farm or farm housing**
17. **Amounts received as pay or allowances by any person while serving on active duty**
18. **Payments received under the Trade Readjustment Act of 1974**
19. **Black Lung payments received under the Benefits Reform Act of 1977**
20. **Needs-based scholarship assistance**

- 21. Financial assistance under Title IV of the Higher Education Act:** Pell grants, BEOG grants, Federal Supplemental Educational Opportunity Grants, Federal Work Study, PLUS, Stafford and Perkins loans like any other kind of loan are debt and not income
- 22. Terminal leave pay:** Severance pay or a cash out of accrued vacation leave
- 23. Stipends received in the following programs:** VISTA, Peace Corps, Foster Grandparents Program, Retired Senior Volunteer Program and Youth Works/Americorps Program
- 24. Foster care payments**

NOTE: When a federal statute specifically provides that income or payments received under such statute shall be excluded in determining eligibility for the level of benefits received under any other federal statute, such income or payments shall be excluded in WIOA eligibility determination.