Documenting Income Eligibility in Crossroads

The Income Information screen is a family screen. It can be completed with any family member selected in the carousel. Total Family Size is used to determine the Eligibility Guideline Amount. There are three ways to document income eligibility in Crossroads: 1) Adjunctive eligibility; 2) Full income screen; and 3) Zero income declaration. Documenting self-reported adjunct program participation is mandatory for federal reporting requirements. It must be collected even if the participant is not proven adjunctively eligible for WIC.

Below are the required steps for each process. The steps begin after a Family has been added and the user has navigated to the Income Information screen in the Certification section of Quick Links.

**Adjunctive Eligibility**

**Step One: Family Size**

- Enter the number of members in the family in Family Size.
- Enter the number of expected infants in No. of Expected Infants, if applicable
- The values for Family Size and No. of Expected Infants are combined to indicate the Total Family Size.
Step Two: Self-Reported Adjunct Program Participation

- Within the Family – Adjunct Participation grid, select all programs that the participant or parent/guardian/caretaker self-reports participating in (if any) for each family member that is participating in WIC.
- An “S” (for “self-reported”) is displayed.

Step Three: Verify Adjunct Program Participation

For at least one program selected, do the following:

- Click the Adjunct Program Verification button to display options to document how adjunct eligibility is verified. The Adjunct Program Verification screen displays.
- Click Verify to use Online Verification (OLV) OR select a Verification Document.
- Click OK to process the screen. You are returned to the Income Information screen. If adjunct program participation is verified, a green check mark displays under Family Eligible and/or next to the participant’s name in the Family – Adjunct Participation box. It varies depending on the program selected and whether eligibility is conferred to the entire family.

Note:

Medicaid: If a Pregnant Woman or Infant is eligible,
the entire family is eligible. SNAP: If any member of the family is eligible, the entire family is eligible.

Step Four: Complete Self Declared Income/Range

- Enter a Self Declared Income (Dollar amount) or select a Self Declared Income Range from the drop down list.
- If the green check mark does not display, continue to the instructions for Full Income Screen below.
- Click Save. A status message displays indicating success and you are navigated to the next screen in the process, Health Information.

Full Income Screening

The Income Detail grid is required if family eligibility is not determined by Adjunct Program Participation Income.

Step One: Family Size

- Enter the number of members in the family in Family Size.
- Enter the number of expected infants in No. of Expected Infants, if applicable
- The values for Family Size and No. of Expected Infants are combined to indicate the Total Family Size.
Step Two: Self-Reported Adjunct Program Participation

- Within the Family – Adjunct Participation grid, select all programs that the participant or parent/guardian/caretaker self-reports participating in (if any) for each family member that is participating in WIC.
- An “S” (for “self-reported”) is displayed.

Note: SNAP = Food and Nutrition Services (FNS) Program (Food Stamps)
TANF = Work First
Step Three: Income Details

Within the Income Details grid, enter a row of information for each income source associated with the family until all applicable income is reported by doing the following:

- Click on the Source column header and select a source of income from the drop down menu.
Select the **Proof.** When no proof exists, choose “Proof Provided with Affidavit.” See **Step Four** below.
Click on the **Proof** column header and choose a proof of income from the drop down menu.
Select the **Frequency**, enter the **Amount** and enter the **Duration** by clicking on the header and choosing from the drop down menu.

- **Comparison Frequency** is adjusted to annual when more than one income frequency exists for a family. Exception: hourly is included in weekly income.
- **Total Income** is calculated by the system and compared to the **Eligibility Guideline Amount**.
- If the **Total Family Income** is less than or equal to the **Eligibility Guideline Amount**, the family is income eligible. A green check mark displays at the top of the screen.

**Family Eligible**
- If the Total Family Income is greater than the Eligibility Guideline Amount, the **Applicant Ineligible** icon (❌) displays at the top of screen indicating the family is not income eligible.
- **Print the Ineligibility Notice.**
- Click **Save**. The system refreshes and you are navigated to the next screen in the process.
Step Four: Income Declared with No Proof (if applicable)

- When no proof exists, choose “Proof Provided with Affidavit.”
- Click Save. The system refreshes and you are navigated to the next screen in the process.

- Navigate to the Certification Signature screen by using the Quick Links bar.
- Choose the Affidavit for Income checkbox. The Affidavit for Income appears in the Certification Documents grid.
- Print the affidavit; complete the Reason for Lack of Proof of Income.
- Have the participant/parent/guardian/caretaker sign the affidavit.
- See the Interim WIC Program Manual, Chapter 6B, Section 5, pages 15-16 for acceptable reasons for No Proof.
Return to the **Income Information** screen and choose the **Scan Document** button to scan the affidavit back into the system.
Zero Income Declaration

The Zero Income Declaration Reason field is required when the family reports zero income and Adjunctive Income Eligibility cannot be verified. For more information about Zero Income Declaration, see the Interim WIC Program Manual, Chapter 6B, Section 5, page 16.

Step One: Family Size

- Enter the number of members in the family in Family Size.
- Enter the number of expected infants in No. of Expected Infants, if applicable
- The values for Family Size and No. of Expected Infants are combined to indicate the Total Family Size.

Step Two: Self-Reported Adjunct Program Participation

- Within the Family – Adjunct Participation grid, select all programs that the participant or parent/guardian/caretaker self-reports participating in (if any) for each family member that is participating in WIC.
- An “S” (for “self-reported”) is displayed.

Note: SNAP = Food and Nutrition Services (FNS) Program (Food Stamps)
TANF = Work First
Step Three:

- Leave the Self Declared Income and Self Declared Income Range fields and the Income Details grid blank.
- Note that the Zero Income Declaration Reason field is disabled if an entry appears in the Self Declared Income or Self Declared Income Range fields.
- Select “No Income” from the Zero Income Declaration Reason drop down list box.
- A green check mark displays at the top of the screen.
- Click Save. A status message displays indicating success and you are navigated to the next screen in the process.