# **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 "🧾" (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 visual is displayed instead of an s, and 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,

NC WIC Program Manual

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



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October 2014

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.

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### **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.

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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 <u>each</u> income source associated with the family **until** <u>all</u> <u>applicable income</u> is reported by doing the following:

 Click on the **Source** column header and select a source of income from the drop down menu.

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Drop Down Menu for Source of Income

 Select the **Proof**. When no proof exists, choose "Proof Provided with Affidavit." See **Step Four** below.

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 Click on the **Proof** column header and choose a proof of income from the drop down menu.

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- 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** 

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- 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.

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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.

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- 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.

a uncation signature		
Signature for		
Rights and Responsibilities		
Affidavit for Identity		
Affidavit for Residency		
Affidavit for Income		
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Release of Information		
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Rights and Responsibilities		
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AFFIDAVIT ATTESTING TO INCOME		
FOR		
WOMEN, INFANTS, AND CHILDREN (WIC) BENEFITS		
he North Carolina WIC Program requires each applicant to show proof of income to apply for the W ead the following statement before completing this form.	/IC Program. Please	
understand that by completing, signing, and dating this form I am certifying that the information I am nderstand that intentional misrepresentation may result in paying the State agency, in cash, the valu	providing is correct. I ue of the food benefits	G
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 Return to the Income Information screen and choose the Scan Document button to scan the affidavit back into the system.

					8	Section Info	ormation 🔒 Cross rossroa
Home Family Services Sched	luling <u>O</u> perations F <u>i</u> n	ance <u>A</u> dministration <u>H</u>	lelp				Logou
Quick Links I	Raven Fami Family ID: F182000 157 Baltimore Drive WRIGHTSVILLE BEACH	13449	Robin				Robin Raven Participant ID: 95401113 Age: 23 years and 11 mont WIC Category: Pregnant
Certification	Family Income						
<ul> <li>Family Demographics</li> <li>Family Assessment</li> <li>Participant Demographics</li> </ul>	Family Size 🖈 No. of E 2 1 Family - Adjunct Pa	Expected Infants Total Far	nily Size Family I	Eligible			
Income Information	Family - Adjunct Pa	SNAP	Me	dicaid		TANE	School Lunch
Anthro / Lab	Robin Raven				(		
★ Assigned Risk Factors ★ Certification Signature Certification Summary Identification Document Family Alerts Notes	Self Declared Incom \$30,000.	00 OR	ed Income Range	Frequency		Amount	Total Items: 1
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🖓 Care Plan	×						
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Dournal of Transactions Subsequent Certification	Zero Income Declara	ation Reason Compari	son Frequency onthly	<b>Total Ir</b> \$1,250.			<b>ibility Guideline Amount</b> 506.00
E Scheduling System							
Family Appointments	▶ Income History						
Quick Appointments Clinic Master Calendar							
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Don't Forget To Sav

### **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.

A New Family

Patriot Famil Family ID: F1820001

#### 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 "「" (for "self-reported") is displayed.

Family Inc	come				<u> </u>					
Family Siz	Family Size 🖈									
4	J									
Family -	Adjunc	t Participation								
		SNAP	Medicaid	TANF	School Lunch					
Mindy	Packer	🗹 🌖	Z (s)							
Isaiah	Isalah Packer 🖉 S 🖉 S									

#### 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.



Family Income						<u> </u>
Family Size 🚖						
3	Deutlinetien					
Family - Adjunct	SNAP		Medicaid		TANF	School Lunch
Carson Colt	Z (5	)				
Self Declared Inc	00 -	elf Declared Income Range 4,000.00 - 25,199.00 💌				
Income Details -						Total Items: 0
	Source	Proof	Frequenc	-y	Amount	Duration
Zero Income Dec	laration Reason	Comparison Frequency Annual	<b>Total</b> \$0.00	Income		ibility Guideline Amount ,131.00

Zero Income Declaration Reason 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.

Colt Family Family ID: F18200013450 125 Footbal Lane WRIGHTSVILLE BEACH, NC 28480	Carson			Carson Colt Participant ID: 954011160T Age: 3 years and 11 months WIC Category: Child
Family Income				<u> </u>
Family Size 🜟 3 Family - Adjunct Participation				
SNAP	Mer	dicaid	TANF	School Lunch
Carson Colt				
Self Declared Income Range				
Income Details				Total Items: 0 🕢
Source X	Proof	Frequency	Amount	Duration
Zero Income Declaration Reason	Comparison Frequency Annual	Total Income \$0.00		Eligibility Guideline Amount 336,131.00
Colt Family Family ID: F1830001450 125 Footbal Lane WRIGHTSVILLE BLACH, NC 28400	Carson			Carson Colt Participant ID: 554011160T Ager: 3 years and 11 months WIC Category: Child
Family Inc	Hedica	ed		School Lunch
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