# **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



Family Size Family Elig 4	gible			
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Isaiah Packer 🗸	<b>I</b> (5)			

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.

Robin Raven				edicaid				5	
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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.

Signature for	ignature for		
Apticant for Security     Affaut for Income     AFFIDAVITATTESTING TO INCOME     FOR     WOMEN, INFANTS, AND CHILDREN (WIC) BENEFITS     WOMEN, INFANTS, AND CHILDREN (WIC) BENEFITS     Gettime Signature     FOR     WOMEN, INFANTS, AND CHILDREN (WIC) BENEFITS     Gettime Signature     Certification Signature     Certification Signature     Signature Soft     Redeese of Information     Certification Signature     Signature Soft     Redeese of Information     Certification Documents     (Applic ant/Parincipant/Parent/Guardian/Caretaker Signature)     (Applic ant/Parincipant/Parent/Guardian/Caretaker Signature)			
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Attachment 1 Page 12 of 16

 Return to the Income Information screen and choose the Scan Document button to scan the affidavit back into the system.

					2	Income Info	ormation 🔒 Cross rossro
Home Family Services Sche	duling <u>O</u> perations F <u>i</u> n	ance <u>A</u> dministration	<u>H</u> elp				Logo
Quick Links I	Raven Famil Family ID: F18200 157 Baltimore Drive WRIGHTSVILLE BEAC	ily D13449 H, NC 28480	Robin				Robin Raven Participant ID: 9540111 Age: 23 years and 11 mon WIC Category: Pregnant
Certification	Family Income						
<ul> <li>✓ Family Demographics</li> <li>✓ Family Assessment</li> <li>✓ Participant Demographics</li> </ul>	Family Size 🔶 No. of	Expected Infants Total F	amily Size Family	Eligible			
<ul> <li>Income Information</li> </ul>	Family - Adjunct Pa	SNAP	M	edicaid	т	ANF	School Lunch
Anthro / Lab	Robin Raven			)			
☆ Assigned Risk Factors ☆ Certification Signature Certification Summary Identification Document Family Alerts	Income Details						Total Items: 1 🌈
Notes Scanned Documents	Salary	Proof Provi	Proof ded with Affidavit	Frequency Twice-Monthly	\$1.250	Amount .00	Duration 24
💮 Care Plan	×			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			
🎁 Issue Benefits							
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🔠 Scheduling System							
Family Appointments	▶ Income History						
Quick Appointments Clinic Master Calendar							
	Scan Document Vie v D	locuments				Save	Cancel Print Ineligibility

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** 

#### 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.

R	amily Income	Family Income									
1	Family Size 🖈										
	4										
ſ	Family - Adjunc	t Participation									
		SNAP	Medicaid	TANF	School Lunch						
	Mindy Packer	🗹 🌖	🗹 🌖								
	Isaiah Packer	<b>Z s</b>	<b>Z</b> (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					
Family Size 🚖					
SNA	P	Medicaid	TANF		School Lunch
Carson Colt					
Self Declared Income	Self Declared Income Range           24,000.00 - 25, 199.00				
Income Details					Total Items: 0 🕢
Source	Proof	Frequenc	y Amou	nt	Duration
Zero Income Declaration Reason	Comparison Frequency Annual	<b>Total</b> \$0.00	Income	Eligibilit \$36,131	<b>y Guideline Amount</b>

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				
Family Size 🚖				
SNAP	Me	licaid	TANF	School Lunch
Carson Colt				
Self Declared Income CR CR CR				
Income Details				Total Items: 0 🕢
Source	Proof	Frequency	Amount	Duration
Zero Income Declaration Reason	Comparison Frequency Annual	Total Income \$0.00	Eli \$30	piblity Guideline Amount 5,131.00
Colt Family Family ID: F18300013450 135 Forbital.com ValorifyValle BEACH, NC 28480	Corson			Carson Colt Participant ID: 994011507 Apr: 3 years and 11 months WIC Category: Child
Family Size Family Eligible	1			
Carson Colt	Medica	d		School Lunch
Self Declared Income OR Self De	clared Income Range			
Income Details				Total Items: 0
Source	Proof	Frequency	Amount	Duration
×				
No Income	Annual	\$0.00	\$36,131.0	20
► Income History				
Scan Docuttent) (View Documents)			5944	Cancel Prost Instagability Instage

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