



Workforce Innovation and Opportunity Act Eligibility



WIOA Low Income Eligibility



WIOA Title 1 Authorization



Federal:
Workforce Investment
Opportunity Act of 2014

State of Illinois:
Department of Commerce
and Economic Opportunity
(DCEO) WIOA E-Policy
Chapter 5.5 - Low-Income
Individuals



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WIOA Low Income

- Additional guidance provided in Training and Employment Guidance Letter (TEGL) 19-16 - Guidance on Services Provided through Adult and Dislocated Worker under WIOA - dated March 1st, 2017
- Additional guidance provided by TEGL 21-16 - Third WIOA Title I Youth Formula Program Guidance - dated March 2nd, 2017

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WIOA Low Income Rules

Adult Program - Priority of service for low income individuals.

In-School Youth - 95% of clients must be low income.

Out-of-School Youth - Youth with limited barriers can be required to meet low income criteria.

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Low Income Individual Policy

- **WIOA E-Policy Chapter 5.5 - Low-Income Individuals**
 - Attachment A - Documentation
 - Attachment B - Inclusions/Exclusions
- **WIOA Notice NO. 16-NOT-06**

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Changes from New TEGs

- New Inclusions - based on guidance provided in TEG's 19-16 and 21-16 - the following sources of income are now included when an income calculation is needed to determine WIOA low income:
 - Unemployment Compensation
 - Child Support Payments
 - Social Security - both Old Age and Survivors

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The eight ways an applicant can become qualified as Low Income

1. Cash Welfare
2. Food Stamps
3. Homeless
4. Free or Reduced Priced Lunch
5. Foster Child
6. Youth Customer Living in a High Poverty Level
7. Family Income Calculation
8. Family of One Due to Disability

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WIOA Low Income Criteria that does not require income calculation

1. Cash Welfare
2. Food Stamps
3. Homeless
4. Free or Reduced Priced Lunch
5. Foster Child
6. Youth Customer Living in a High Poverty Level

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WIOA Low Income Criteria

The criteria for Cash Welfare and Food Stamps is:

Personally receives, or is a member of a family that receives or received in the past six (6) months either **Cash Welfare** or **Food Stamps**.

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IWDS Illinois Workforce Development System **Case Management**

Public Assistance

[Sally WIOA](#) [Application Summary](#)

SSN: ***-**-9823 App LWA:15 App Date:04/19/2016

*Transitional Assistance:	<input type="checkbox"/>
*Refugee Help:	<input type="checkbox"/>
*SSI:	<input type="checkbox"/>
*SSDI:	<input type="checkbox"/>
*On Food Stamp:	<input type="checkbox"/>
*TANF:	<input type="checkbox"/>
DHS Case #?:	<input type="text"/>
*Months Received TANF in Prior 60 months?	<input type="text" value="0"/>
	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

The Public Assistance Screen is where both Cash Welfare and Food Stamps eligibility criteria are captured

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The WIOA definition of “Family” is:

The term “family” means 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. Married couple and dependent children.
- B. Parent or guardian and dependent children.
- C. Married couple.

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Low Income: Cash Welfare

1. **Temporary Assistance for Needy Families (TANF)** program under Part A of Title IV of the Social Security Act, or
2. **Supplemental Security Income (SSI)** program established under Title XVI of the Social Security Act, or
3. **State or local income-based public assistance.**

No Income Calculation Needed...

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Public Assistance

[Sally WIOA](#) [Application Summary](#)

SSN: ***-**-9823 App LWA:15 App Date:04/19/2016

*Transitional Assistance: No ▾

*Refugee Help: No ▾

*SSI: No ▾

*SSDI: No ▾

*On Food Stamp: ▾

*TANF: Yes ▾

DHS Case #?:

*Months Received TANF in Prior 60 months?



Public Assistance

If “Yes” is entered on the IWDS Public Assistance screen for following:

- Transitional Assistance
- Refugee Help
- SSI
- TANF

The client will be determined low income based on “Cash Welfare”



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IWDS Illinois Workforce Development System **Case Management**

Public Assistance

[Sally WIOA](#) [Application Summary](#)

SSN: ***-**-9823 App LWA:15 App Date:04/19/2016

*Transitional Assistance: No

*Refugee Help: No

*SSI: No

*SSDI: No

*On Food Stamp:

*TANF: Yes

DHS Case #?: 9408226102847

*Months Received TANF in Prior 60 months? 24

If the TANF is populated with "Yes", the DHS Case # must be provided and the number or months the individual has been on TANF must be included.



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Low Income: Food Stamps

Personally receives, or is a member of a family that receives or received in the past six (6) months the **Supplemental Nutrition Assistance Program (SNAP)** assistance.

Food and Nutrition Act of 2008





Public Assistance

[Susie Adult1A](#) [Application Summary](#)
 SSN: ***-**-8731 App LWA:20 App Date:03/17/2014

* Transitional Assistance: No ▾

* Refugee Help: No ▾

* SSI: No ▾

* SSDI: No ▾

* On Food Stamp: Yes ▾

* TANF: Yes No

DHS Case #?:

* Months Received TANF in Prior 60 months?

If Food Stamp and TANF are populated with “Yes” at certification, the documentation must be on hand to support both criteria. The documentation must remain in the hard copy file for monitoring and data validation.

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Low Income: Homeless

1. Individual who lacks a fixed, regular or adequate nighttime residence; and
[Violence Against Women Act of 1994](#)
2. Adult or youth with a primary nighttime residence that is a public or privately operated shelter for temporary accommodation.

[McKinney-Vento Homeless Assistance Act](#)



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IWDS Illinois Workforce Development System **Case Management**

Characteristics and Barriers

[Sally WIOA](#) [Application Summary](#)

SSN: ***-**-9823 App LWA:15 App Date:04/19/2016

*Drug/Alcohol Dependency:	No	▼
*Limited English Proficiency:	No	▼
*English Language Learner:	No	▼
*Offender, Felon:	No	▼
*Offender, Misdemeanor:	No	▼
*Homeless:	Yes	▼
*Single Parent Barrier:	No	▼
*Facing Substantial Cultural Barriers:	No	▼

Save Cancel

If “Yes” is entered in “Homeless” the client will be determined as low income.



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Low Income : Free or Reduced Priced Lunch

Receives or is eligible to receive a free or reduced price lunch under the Richard B. Russell National School Lunch Act

-> **Criteria for In-School Youth Only**

Must have documentation from school.



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Low Income : Free or Reduced Priced Lunch

- TEGL 21-16 and our Low Income Policy clarified that “In schools where the whole school automatically receives free or reduced price lunch, WIOA programs must base low-income status on an individual student’s eligibility to receive free or reduced price lunch or on meeting one of the other low-income categories under WIOA”
 - Meaning if only whole school criteria is used for free or reduced lunch, you cannot use this method to determine low income criteria and must use one of the other low income categories to determine an individuals low income status

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IWDS Illinois Workforce Development System **Case Management**

Youth Barriers

[Holly Youth-InSchool](#) [Application Summary](#)

SSN: ***-**- 9731 App LWA:15 App Date:04/25/2016

Enroll Under 5% Window?	No	▼
Pregnant / Parenting Youth?	No	▼
Runaway Youth?	No	▼
Youth Needing Assistance?	No	▼
Foster Child?	No	▼
*Youth Aged Out of Foster Care?	No	▼
Serious Barriers to Employment as Defined by LWIB?	No	▼
Within age of Compulsory School Attendance, but not attending School?	No	▼
Subject to Juvenile or Adult Justice System?	No	▼
Eligible to Receive Free or Reduced Price Lunch?	Yes	▼
A Youth who lives in a high poverty area as determined by the census tract?	No	▼

Save Cancel

“Youth Barriers” screen is where the “Free or Reduced Price Lunch” question is housed - if an in-school youth client has a response of “Yes” the client will be determined as low income.



Low Income: Foster Child

A minor on behalf of whom State or local government payments are made to a foster parent or other guardian.



Youth Barriers

[Holly Youth-InSchool](#) [Application Summary](#)

SSN: ***-**- 9731 App LWA:15 App Date:04/25/2016

Enroll Under 5% Window?	No	▼
Pregnant / Parenting Youth?	No	▼
Runaway Youth?	No	▼
Youth Needing Assistance?	No	▼
Foster Child?	Yes	▼
*Youth Aged Out of Foster Care?	No	▼
Serious Barriers to Employment as Defined by LWIB?	No	▼
Within age of Compulsory School Attendance, but not attending School?	No	▼
Subject to Juvenile or Adult Justice System?	No	▼
Eligible to Receive Free or Reduced Price Lunch?	No	▼
A Youth who lives in a high poverty area as determined by the census tract?	No	▼

“Youth Barriers” where the “Foster Child” question is housed - if youth client has a response of “Yes” - the client will be determined as low income



Youth Living in a High Poverty Level

According to Section 129(a)(2) of WIOA, for ISY and OSY, a youth qualifies as low income if the youth lives in a high poverty area.

Many rural counties in the U.S. have a poverty rate of 25 percent or above - data can be obtained www.FactFinder.Census.Gov



Youth Barriers

[Holly Youth-InSchool](#) [Application Summary](#)

SSN: ***-**- 9731 App LWA:15 App Date:04/25/2016

Enroll Under 5% Window?	No	▼
Pregnant / Parenting Youth?	No	▼
Runaway Youth?	No	▼
Youth Needing Assistance?	No	▼
Foster Child?	No	▼
*Youth Aged Out of Foster Care?	No	▼
Serious Barriers to Employment as Defined by LWIB?	No	▼
Within age of Compulsory School Attendance, but not attending School?	No	▼
Subject to Juvenile or Adult Justice System?	No	▼
Eligible to Receive Free or Reduced Price Lunch?	No	▼
A Youth who lives in a high poverty area as determined by the census tract?	Yes	▼

“Youth who live in a high poverty area” question is if youth client has a response of “Yes” - the client will be determined as low income



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Family Income Calculation

A Family Income Calculation is only needed if the client does not meet any of the six automatic low income qualification criteria

A family with total family income that does not exceed the higher of:

- The poverty line; or
- Seventy percent (70%) of the lower living standard income level

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Family Income Calculation Requirements

Must capture the income on each individual within the family

Pay stubs or other acceptable documentation for the family's income

Documentation supporting family size

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Must have the family identified WIOA Family definition

The term “family” means 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 married couple and dependent children.
- (B) A parent or guardian and dependent children.
- (C) A married couple.

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Family Income Calculation Requirements

It is essential to view DCEO WIOA Policy 5-5 - Low Income Individuals - specifically Attachment “B” - Inclusions and Exclusions for Determining Family Income

Any family member that counts towards the WIOA defined family must have the included income in the previous six months of the family income calculation



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IWDS Illinois Workforce Development System **Case Management**

Income Calculation

[Sally WIOA](#) [Application Summary](#)

SSN: ***-**-9823 App LWA:15 App Date:04/19/2016

Monthly	1	2	3	4	5	6	Row Total
Wages	<input type="text"/>	\$0.00					
Self-Employed Wages	<input type="text"/>	\$0.00					
Pension	<input type="text"/>	\$0.00					
Insurance Annuity	<input type="text"/>	\$0.00					
Alimony	<input type="text"/>	\$0.00					
Other	<input type="text"/>	\$0.00					
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Monthly: \$0.00

Annual: \$0.00

Calculate Totals

Save

Cancel

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Family Income Calculation

It is essential to view DCEO WIOA Policy - 5.5 - Low Income Individuals - specifically Attachment "B" - Inclusions and Exclusions for Determining Family Income

Any family member that counts towards the WIOA defined family must have the included income in the previous six months of the family income calculation

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Family Income Calculation

After the entire family's income has been loaded into the "Income Calculation" the Career Planner must "Calculate Totals"

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Income Calculation

[Sally WIOA](#) [Application Summary](#)

SSN: ***-**-9823 App LWA:15 App Date:04/19/2016

Monthly	1	2	3	4	5	6	Row Total
Wages	\$1655.00	\$1655.00	\$1655.00	\$1655.00	\$1655.00	\$1655.00	\$9930.00
Self-Employed Wages							\$0.00
Pension	\$1270.00	\$1270.00	\$1270.00	\$1270.00	\$1270.00	\$1270.00	\$7620.00
Insurance Annuity							\$0.00
Alimony							\$0.00
Other							\$0.00
Total	\$2925.00	\$2925.00	\$2925.00	\$2925.00	\$2925.00	\$2925.00	\$17550.00

Monthly: \$2925.00
 Annual: \$35100.00



"Calculate Totals"



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Family Characteristics

[Sally WIOA](#) [Application Summary](#)

SSN: ***-**-9823 App LWA:15 App Date:04/19/2016

*Family Type:

*Family Size:

*Dependant Less than 18:

*Family of 1 due to Disability: No

List Family
Save Cancel



IWDS Illinois Workforce Development System **Case Management**

Family Characteristics

[Sally WIOA](#) [Application Summary](#)

SSN: ***-**-9823 App LWA:15 App Date:04/19/2016

*Family Type:
 *Family Size: Not a family member
 Not Reported
 *Dependant Less than 18: Other family member
 *Family of 1 due to Disability: Parent in one-parent family
 Parent in two-parent family
 List F...

Family Characteristics Screen

Documenting the Family Members is required if you are conducting an income calculation





The definition of Family is important to understand:

The term “family” means 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 married couple and dependent children.
- (B) A parent or guardian and dependent children.
- (C) A married couple.



Maintain Family

[Sally WIOA](#) [Application Summary](#)

SSN: ***-**-9823 App LWA:15 App Date:04/19/2016

* Last:
 * First:
 Relationship:
 * Age:
 Dependent:
 Has Income:

Maintain Family Screen

You must Document all family members that are counted towards the income calculation

Maintain Family

[Sally WIOA](#) [Application Summary](#)

SSN: ***-**-9823 App LWA:15 App Date:04/19/2016

*Last:
 *First:
 Relationship:
 *Age:
 Dependent:
 Has Income:

Can a 19 year old adult child still be considered part of the WIOA defined "Family"?

List Family

[Sally WIOA](#) [Application Summary](#)

SSN: ***-**-9823 App LWA:15 App Date:04/19/2016

Family Size: 6
 Dependant Under 18:3

	First	Last	Relationship	Age	Dependent	Has Income
<input type="button" value="View"/>	Bobby	WIOA	Husband	48 Years	N	Y
<input type="button" value="View"/>	Sally	WIOA	Applicant	44 Years	N	Y
<input type="button" value="View"/>	Cindy	WIOA	Daughter	12 Years	Y	N
<input type="button" value="View"/>	Carla	WIOA	Daughter	14 Years	Y	N
<input type="button" value="View"/>	William	WIOA	Son	16 Years	Y	N
<input type="button" value="View"/>	Ryan	WIOA	Son	19 Years	N	Y



Yes, but the income of the Adult child must also be included as part of the "Family Income" calculation



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For this particular “Family” they have “six” family members, everyone please look at DCEO WIOA Notice NO. 16-NOT-06 - Attachment “B”

Would this family be considered low income?

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“Six” family members, total family income is \$35,100 and the client is from LWIA 15

According to Attachment “B” of DCEO WIOA Notice NO. 16-NOT-06 - Maximum income for a family of six at LWIA 15 would be \$36,406 so yes, this family would meet WIOA low income criteria

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For the income calculation the “Career Planner” would be responsible for having the income verification documentation for each individual in the family that had income

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New Guidance in TEGL 21-16

If an individual is not living in a single residence with other family members, that individual is not a member of a family for the purpose of WIOA Income calculations

- **Meaning the individual not living with the WIOA defined family can use their own income to support the income determination**
- **Only applicable for individuals not living with their WIOA defined family**

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WIOA Defined Family

The term “family” means 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 married couple and dependent children.
- (B) A parent or guardian and dependent children.
- (C) A married couple

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If Over Family Income

If a client does not meet any of the automatic low income qualification factors, and is over the family income low income level, there is one last way low income can be determined



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Family of One due to a Disability

Is an individual with a disability whose own income does not exceed the higher of:

The poverty line; or

Seventy percent (70%) of the lower living standard income level, but who is a member of a family whose income does not meet this requirement; or

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Family of one due to a disability

IWDS must be documented in three places within the IWDS application to properly document family of one due to a disability

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Family of one due to a disability

1. On the “Private Information” screen the disability must be identified
2. The “Income Calculation” screen is where the clients income must be documented
3. The “Family Characteristics” screen is where the criteria of “Family of One” is specified

IWDS Illinois Workforce Development System **Case Management**

Private Information

[Holly Youth-InSchool](#) [Application Summary](#)

SSN: ***-**-9731 App LWA:15 App Date:04/25/2016

*Social Security Number: 378-97-9731

*Hispanic or Latino? No

*Race/Ethnicity:
 American Indian or Alaskan Native
 Asian
 Black
 Hawaiian or Pacific Island
 Prefer Not To Answer
 White

*Gender: Female

*Birth Date: 06/15/1997

Mother's Maiden Name:

*Authorized to Work In USA: Yes

*Selective Service Compliance: Not Applicable

Selective Service Number: No

*Disability? Yes

Category of Disability: Disability Affecting Employment

Save



Family of one due to a disability

The clients income for the six months prior to application date must be documented on the “Income Calculation” screen

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Income Calculation

[Holly Youth-InSchool](#) [Application Summary](#)

SSN: ***-**-9731 App LWA:15 App Date:04/25/2016

Monthly	1	2	3	4	5	6	Row Total
Wages	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Self-Employed Wages							\$0.00
Pension							\$0.00
Insurance Annuity							\$0.00
Alimony							\$0.00
Other	\$300.00	\$300.00	\$300.00	\$300.00	\$300.00	\$300.00	\$1800.00
Total	\$300.00	\$300.00	\$300.00	\$300.00	\$300.00	\$300.00	\$1800.00

Monthly: \$300.00

Annual: \$3600.00

Calculate Totals

Save

Cancel

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Must capture the income for the client

If the client does not have income, the client must write an attestation stating they have not had income in the previous 6-month period

If client has income, it must be at or under the income for a family of one (\$12,060) as described in WIOA Notice 16-NOT-06, Revised Income Guidelines for Determining Low Income Status for WIOA

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On the “Family Characteristics” screen the client is characterized as “Family of One Due to a Disability”

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Family Characteristics

[Holly Youth-InSchool](#) [Application Summary](#)

SSN: ***-**-9731 App LWA:15 App Date:04/25/2016

*Family Type: ▾

*Family Size:

*Dependant Less than 18:

*Family of 1 due to Disability: ▾



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Family of One due to a Disability

For documentation, must have:

- Documentation addressing income
- Documentation addressing disability

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Criteria Documentation and Subcriteria	Conjunction
(Authorized to Work in the U S Birth Certificate	AND
Compliant With Selective Service Not Applicable	AND
Age 14-21 At Enrollment Birth Certificate	AND
(WIA Income Eligible	OR
Income Applicant Statement (See Part III)	
Family Size Disabled (See Individuals with Disabilities)	
County Drivers License	
Cash Welfare Recipient	OR
Food Stamp Recipient	OR
Homeless	OR
Foster Child	OR
) Deficient in Basic Literacy Skills	AND
School Dropout	OR
Homeless	OR
Runaway Youth	OR
Foster Child	OR
Pregnant or Parenting Youth	OR
Offender Applicant Statement (See Part III)	OR
Youth Needing Additional Assistance Other Locally-Determined Documentation)



Low Income Individual

Of the eight ways an individual can be determined to be low income for WIOA there are six different ways that do not require capturing income information on the customer and/or the customers family



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WIOA Low Income Criteria that does not require income calculation

- 1. Cash Welfare**
- 2. Food Stamps**
- 3. Homeless**
- 4. Free or Reduced Priced Lunch**
- 5. Foster Child**
- 6. Youth Customer Living in a High Poverty Level**

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Doesn't Meet Automatic Qualification Criteria

If a client does not meet one of the previous six automatic qualification factors that is when an income calculation should be utilized to determine low income status

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WIOA Low Income Eligibility

All determinations of low-income status for customers must be supported by proper documentation of the qualifying condition as outlined in the “WIOA Title IB General and Fund Source Eligibility Requirements and Documentation Sources”

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WIOA Low Income Eligibility

Questions ?'s



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