




Charlie Crist
Governor
Cynthia R. Lorenzo
Director

MEMORANDUM

DATE: April 28, 2010

TO: Regional Workforce Board Executive Directors

FROM: Lois A. Scott, Program Manager, One Stop and Program Support 

SUBJECT: Clarification of Included and Excluded Income for WIA Eligibility and Priority of Services

The Agency has reviewed existing federal and state guidance regarding how household income is calculated, specifically what income is included in the calculation and what is excluded for the determination of eligibility based on low income under the Workforce Investment Act (WIA). Based on this review, the following guidance is provided.

The following types of income are to be included in the calculation of family income:

- Wages and salaries before any deductions
- Net receipts from self-employment (receipts from an individual's unincorporated business, partnership, or farm which one operates as an owner, renter, or sharecropper, after deductions for business/farm expenses)
- Pension or retirement income (including military retirement pay and annuity payments from IRAs, KEOUGHS, 401(k) plans, etc.)
- Strike benefits from union funds
- Net rental income
- Interest, dividends, royalties
- Periodic receipts from estates, trusts (but see excluded income below)
- Alimony
- Educational Assistance and training stipends (but see excluded income below)
- Other support from an absent family member not living in the household
- Other miscellaneous sources of revenue considered as reportable income by the IRS (net gambling or lottery winnings, etc.)

Agency for Workforce Innovation

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The following types of income are excluded when determining family income:

- Wages paid through the Senior Community Service Employment Program funded under Title V of the Older Americans Act
- Unemployment compensation
- Trade Readjustment Allowances
- Social security benefits (old age, survivors, disability)
- Public cash assistance, e.g., TANF, emergency assistance, general relief, supplemental security income (SSI)
- Noncash assistance, e.g., food stamps, housing assistance, school meals, Medicare, Medicaid
- Noncash benefits, e.g., employer-funded insurance, housing
- Military pay and allowances received by a family member on active duty (includes service while active in the National Guard or Reserves)
- Educational benefits for veterans and other eligible persons
- Disability and death benefits for veterans and other eligible persons
- Financial aid under Title IV of the Higher Education Act, e.g., PELL Grants, Supplemental Educational Opportunity Grants (SEOG), Federal Work Study, as well as needs-based scholarships
- Training stipends under WIA except that OJT assistance is included as part of wages and salaries
- Child support, including foster child payments
- One-time unearned income such as, but not limited to:
 - i) payments received for a limited fixed term under income maintenance programs and supplemental (private) unemployment benefits plans;
 - ii) one-time or fixed-term scholarship and fellowship grants;
 - iii) accident, health, and casualty insurance proceeds;
 - v) disability and death payments, including fixed term (but not lifetime) life insurance annuities and death benefits;
 - v) one-time awards and gifts;
 - vi) inheritance, including fixed term annuities; and
 - vii) fixed-term workers compensation awards
- Capital gains
- Assets drawn down as withdrawals from a bank, sale of property
- Periodic receipts from a Supplemental Needs Trust, i.e. a type of special needs trust which complies with provisions of U.S. state and federal law and is designed to provide benefits to, and protect the assets of, physically disabled or mentally disabled persons while still allowing such persons to be qualified for and receive governmental care benefits under SSI, SSDI, and/or Medicaid
- Tax refunds, gifts, loans
- When a federal statute specifically provides that income or payments received under the 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 WIA eligibility determination.

Please share this information with appropriate staff.

LAS/oci

cc: Barbara Griffin Richard Meik Kevin Neal Cliff Atkinson