WIOA Income Calculation Worksheet: Part II

Identifying Information	
Applicant's Name:______________________________________ Last First MI	Participant ID: ______________ Application Date: ____________

Income Period – From (6 months prior to application): ______________________________ **To (application date):** _________________

Family Member: ____ **Relationship:** _________________________

☐ **Straight Pay Method:** Use this method if family member provides all income documents covering income review period.

Employer or Income Source		Pay Date	# of Pay Periods Weekly=26, Bi-weekly=13,Monthly=6	=	Pay Period Gross Pay
1				=	
2				=	
3				=	
4				=	
6-Month Income: Sum of all Pay Period Gross Pays				=	

☐ **Average Pay Method:** Use this method if family member provides at least 2 income documents from each source.

Employer or Income Source		Pay Date	Gross Pay	÷	# Weeks in Time Frame: Weekly=1, Bi-weekly=2,Monthly=4.3	=	Weekly Gross Income
1				÷		=	
2				÷		=	
3				÷		=	
# of Pay Stubs Collected			**Sum of Weekly Gross Income**			+	
Average Weekly Gross: Sum of Weekly Income ÷ # of Pay Stubs						=	
6-Month Income: Average Weekly Gross × 26 (there are 26 weekly pay days in a six-month period)						=	

WIOA Income Calculation Worksheet: Part II (continued)

☐ **Year-to-Date Method:** Use this method if the family member provides a recent pay stub or income source with the cumulative year -to-date gross income indicated on it.

Employer or Income Source		Pay Date	Cumulative year-to-date Gross Pay	÷	# of cumulative weeks on pay stub	=	Weekly Gross Income
1				÷		=	
2				÷		=	
Sum of Weekly Gross Income (Average Weekly Gross Income):						+	
6-Month Income: Average Weekly Gross × 26 (there are 26 weekly pay days in a six-month period)						=	

☐ **Intermittent Work/Other Income Method**: Use this method if the family member has not had steady income from one or more sources during the review period.

Employer		Description of Work	Start Date	End Date		Total Gross Income
1						
2						
6-Month Income: Sum of all Total Gross Incomes					=	

Guidelines for Income Calculation Worksheet: Part II

When calculating income, use any one of the following methods as appropriate. A separate form should be used for each family member with income. The examples are illustrative only and as many pay stubs as needed and available to accurately calculate family income should be obtained.

1. **STRAIGHT PAY METHOD**
   Under the Straight Pay Method, pay stubs covering the most recent three to four months of family income should be submitted. Upon review, it is determined that the wages on the pay stubs are the same, with no variations.

   The income is calculated based upon the wages indicated on one of the pay stubs, since there are no variations in the gross income on any of the pay stubs. Based upon the length of the pay period the gross income is multiplied by the number of pay periods in a six-month period (weekly = 26, bi-weekly = 13, or monthly = 6).

   The result will be the six-month income used to determine WIOA low-income eligibility.

   EXAMPLE:
   Five bi-weekly pay stubs are provided indicating gross wages of $548.00 each. The pay stubs are sporadic and cover a period of three months but there is no variation in the gross income.

   Multiply: $548 x 13 = $7,124.

   $7,124 is the six-month income used to determine WIOA low-income eligibility.

2. **AVERAGE PAY METHOD**
   Average Pay Method is used if there is a variation in pay from pay stub to pay stub and it is a result of overtime, lost time, or working for different employers.

   To compute the six-month income, the gross earning total of all the pay stubs provided is divided by the number of weeks in the timeframe for each pay stub submitted (weekly = 1, bi=weekly = 2, monthly = 4.3). These totals are added together and divided by the number of pay stubs submitted. The resulting average gross weekly income is then divided by 26 determining the 6-month income.

   EXAMPLE:
   <u>Example 1:</u>
   Three pay stubs are provided and the pay frequency is bi-weekly: $1,009, $932, $1,032

   Divide each amount by 2 (bi-weekly: 1009/2 = $504.50: 932/2 = $466: 1032/2 = $516 Add totals together: $504.50 + $466 + $516 = $1486.50
   Divide by 3 (# of pay stubs submitted): $1486.50/3 = $495.50
   Multiply total by 26 (# of weeks in a 6-month period): $495.50 x 26 = $12,883

   $12,883 is the six-month income amount used to determine WIOA low-income eligibility.

Example 2:
Six pay stubs are provided and the pay frequency is weekly: $534, $475, $398, $534, $498, and $534

*You can skip the first step since the pay frequency is weekly and you would be dividing each amount by 1

Add: $534 + $475 + $398 + $534 + $498 + $534 = $2973.00
Divide by 6 (# of pay stubs submitted): $2973/6 =
$495.50 Multiply total by 26: $495.50 x 26 = $12,883.

$12,883 is the six-month income amount used to determine WIOA low-income eligibility.

3. **YEAR-TO-DATE METHOD**

Under the Year-To-Date Method of calculating six-month gross income, the participant provides recent pay stubs with cumulative year-to-date gross earnings indicated on the pay stub. The cumulative year-to-date gross earnings indicate the gross earnings up to the date of the pay period ending date, on the pay stub.

To compute the six-month income, the intake worker counts the number of cumulative weeks that have occurred in the year-to-date period, and divides that number into the gross year-to- date earnings indicated on the pay stub to get the weekly gross income. The result of this computation weekly gross income is then multiplied by the number of weeks in a six-month period to determine the six-month gross earnings.

EXAMPLE:
Participant provides the intake worker with a recent pay stub dated July 3rd showing his **year-to-date earnings** were $25,200 so far that year. The cumulative number of weeks for the year is 27, Calculation of the gross annualized income would be done as follows:

Divide: 25,200 by 27 = $933
Multiply: $933 by 26 (No. of weeks in 6 months) = $24,258
$24,258 is the 6-month income figure for this individual or family member.

4. **INTERMITTENT WORK METHOD**

When an applicant has not had steady work with one or more employers, they should supply as many pay stubs as possible and complete an Applicant Statement explaining all missing pay stubs and not-work periods during the last six months.
If an applicant reports little or no includable income, they should indicate the resources relied upon for life support during the last six months, on the Applicant Statement. Such resources may include such things as unpaid debts, gifts, loans, unemployment compensation, etc.