

## 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**.

Income Information | Don't Forget To Save! | Crossroads

Home | Family Services | Scheduling | Operations | Finance | Administration | Help

Quick Links

New Family

Family Search

Certification

Family Demographics

Family Assessment

Patriot Family  
Family ID: F18200013448  
167 New England Road  
WRIGHTSVILLE BEACH, NC 28480

Margaret  
Participant ID: 954011133R  
Age: 23 years and 5 months  
WIC Category: Pregnant

Family Income

Family Size	No. of Expected Infants	Total Family Size
4	2	6

Income Information | Don't Forget To Save! | Crossroads

Home | Family Services | Scheduling | Operations | Finance | Administration | Help

Quick Links

New Family

Family Search

Certification

Family Demographics

Family Assessment

Packer Family  
Family ID: F18200013447  
125 Franklin Lane  
WRIGHTSVILLE BEACH, NC 28480

Mindy  
Participant ID: 954011132R  
Age: 9 days  
WIC Category: Infant

Isiah  
Participant ID: 954011131R  
Age: 9 days  
WIC Category: Infant

Family Income

Family Size
4

### 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.

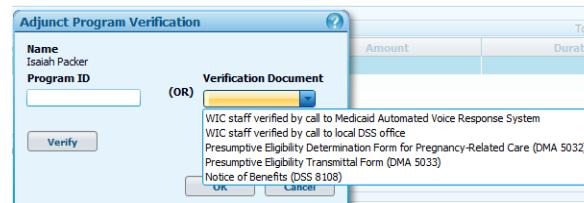
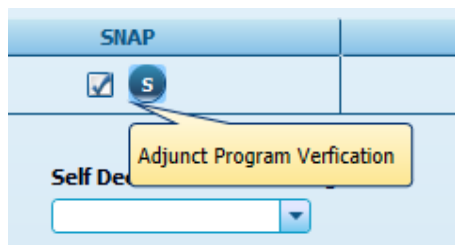
Family Income				
Family Size <span style="color: yellow;">★</span>				
4				
Family - Adjunct Participation				
	SNAP	Medicaid	TANF	School Lunch
Mindy Packer	<input checked="" type="checkbox"/> S	<input checked="" type="checkbox"/> S	<input type="checkbox"/>	<input type="checkbox"/>
Isaiah Packer	<input checked="" type="checkbox"/> S	<input checked="" type="checkbox"/> S	<input type="checkbox"/>	<input type="checkbox"/>

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

### Step Three: Verify Adjunct Program Participation

For at least one program selected, do the following:

- Click the **Adjunct Program Verification** button **S** 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 **V** 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.



Family Income				
Family Size <span style="color: yellow;">★</span>				
4				
Family - Adjunct Participation				
	SNAP	Medicaid	TANF	School Lunch
Mindy Packer	<input checked="" type="checkbox"/> V	<input checked="" type="checkbox"/> V	<input type="checkbox"/>	<input type="checkbox"/>
Isaiah Packer	<input checked="" type="checkbox"/> V	<input checked="" type="checkbox"/> V	<input type="checkbox"/>	<input type="checkbox"/>

**Note:**

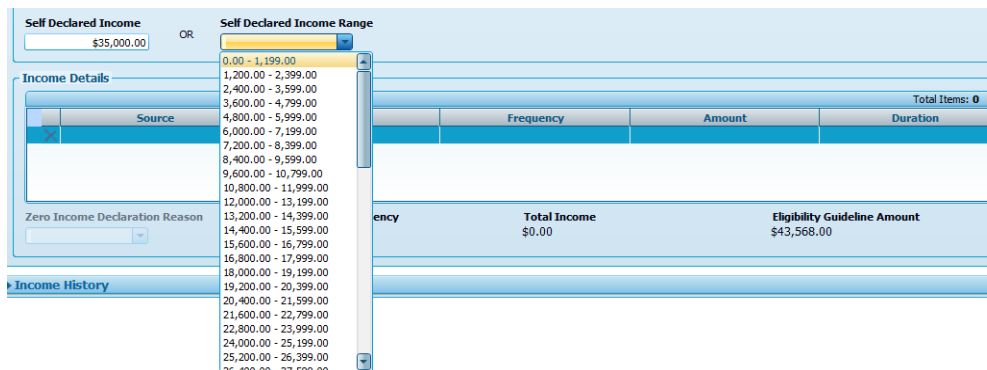
*Medicaid:* If a Pregnant Woman or Infant is eligible,

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**.

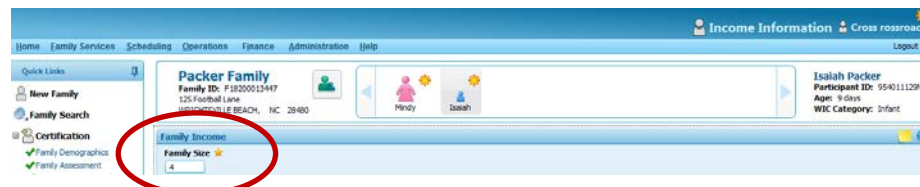


**Full Income Screening**


The Income Detail grid is required if family eligibility is not determined by Adjunct Program Participation Income.

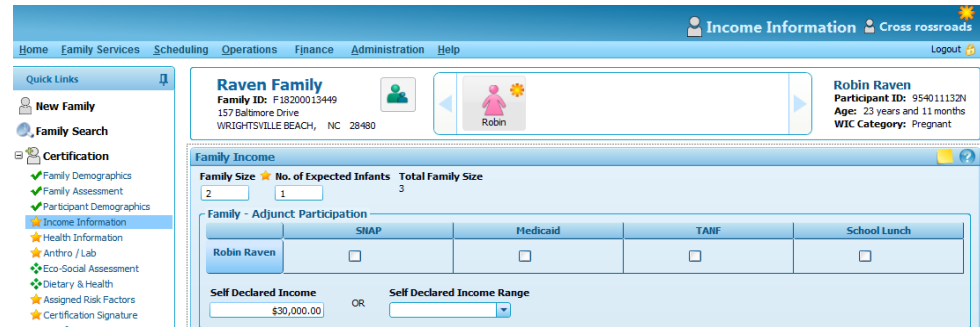
**Step One: Family Size**

- 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 “” (for “self-reported”) is displayed.

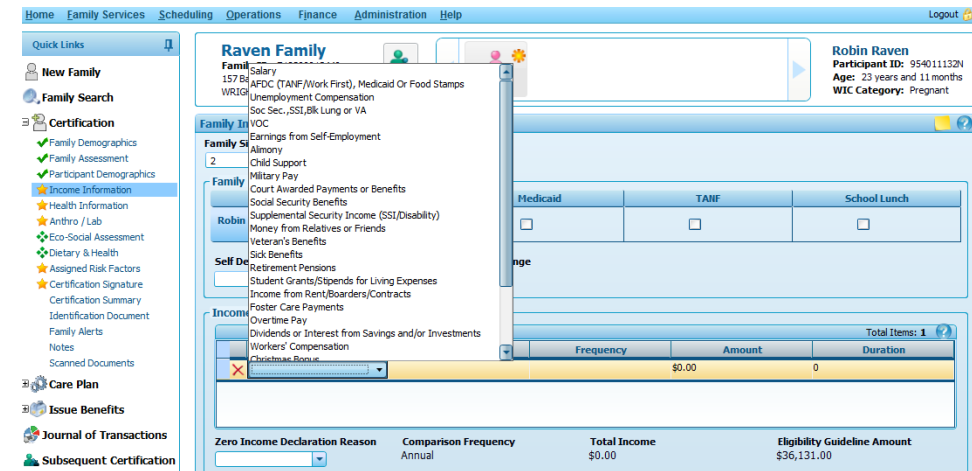
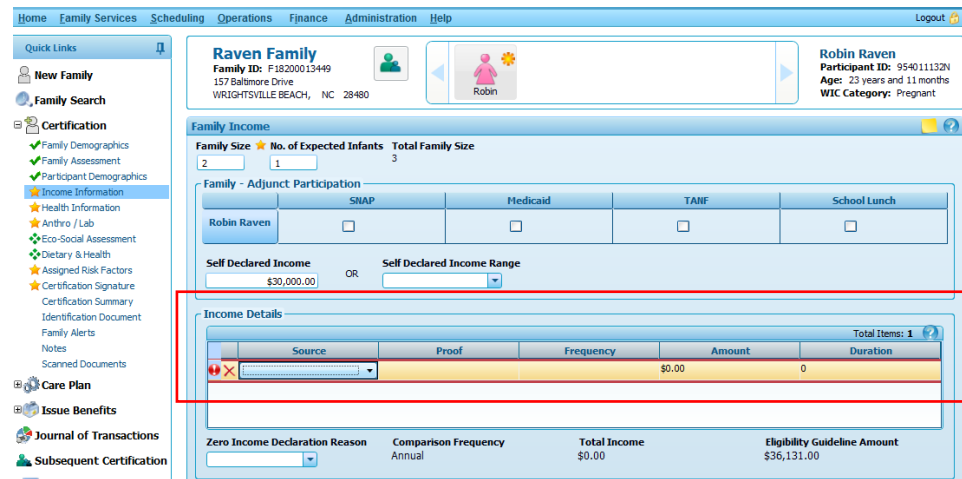


Note: SNAP = Food and Nutrition Services (FNS) Program (Food Stamps)  
TANF = Work First

### Step Three: Income Details

Within the **Income Details** grid, enter a row of information for **each** income source associated with the family **until all applicable income** is reported by doing the following:


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




Drop Down Menu for Source of Income

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

**Raven Family**  
 Family ID: F18200013449  
 157 Baltimore Drive  
 WRIGHTSVILLE BEACH, NC 28480



 Robin

**Robin Raven**  
 Participant ID: 954011132N  
 Age: 23 years and 11 months  
 WIC Category: Pregnant

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**Family Income**

Family Size ★ No. of Expected Infants Total Family Size  
 2 1 3

**Family - Adjunct Participation**

	SNAP	Medicaid	TANF	School Lunch
Robin Raven	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Self Declared Income** OR **Self Declared Income Range**


**Income Details** Total Items: 1

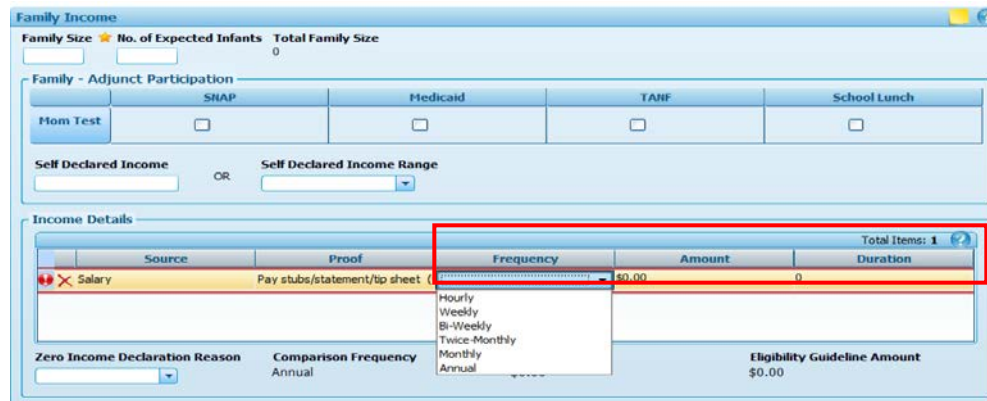
	Source	Proof	Frequency	Amount	Duration
✖	Salary			\$0.00	0

**Zero Income Declaration Reason** Comparison Frequency Total Income Eligibility Guideline Amount  
 Annual \$0.00 \$36,131.00

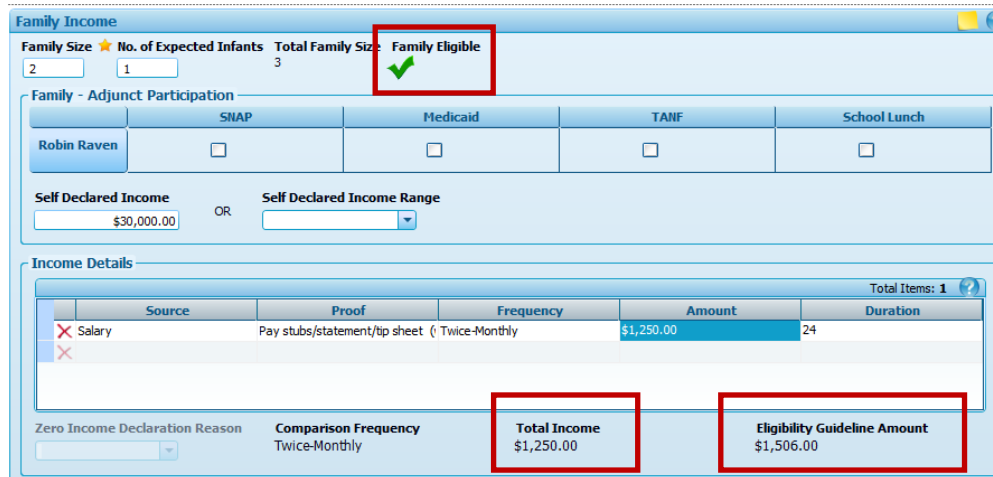
- Click on the **Proof** column header and choose a proof of income from the drop down menu.

The screenshot shows the 'Family Income' application window. At the top, it displays 'Family Size' (2) and 'No. of Expected Infants' (1), with a 'Total Family Size' of 3. Below this is a 'Family - Adjunct Participation' table with columns for SNAP, Medicaid, TANF, and School Lunch, each with a checkbox. The name 'Robin Raven' is listed in the first column. Underneath, there are fields for 'Self Declared Income' (set to \$30,000.00) and 'Self Declared Income Range'. The main section is 'Income Details', which contains a table with columns: Source, Proof, Frequency, Amount, and Duration. A red box highlights the 'Proof' column header. A dropdown menu is open from this header, listing various proof options: 'Income declared with no proof', 'Pay stubs/statement/tip sheet (within 60 days)', 'Statement from employer', 'W-2 form (recent calendar year)', 'Accounting statements (recent calendar year)', 'Income tax return', 'Bank statement', 'Broker statement', 'Military leave and earnings statement (LES)', 'Statement of government benefits', 'Foster care payment letter', 'Grant/stipend award documentation', 'Data Conversion Default', and 'Proof Provided with Affidavit'. To the right of the table, 'Total Income' is shown as 0.00 and 'Eligibility Guideline Amount' as \$36,131.00. A 'Zero Income Declaration Reason' dropdown is also visible.

- 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.



The screenshot shows the 'Family Income' form. At the top, 'Family Size' is 2, 'No. of Expected Infants' is 1, and 'Total Family Size' is 3. Under 'Family - Adjunct Participation', 'Mom Test' is selected. 'Self Declared Income' is empty. The 'Income Details' table has one row: 'Salary' with 'Pay stubs/statement/tip sheet' as proof, a frequency dropdown menu open showing options like 'Hourly', 'Weekly', 'Bi-Weekly', 'Twice-Monthly', 'Monthly', and 'Annual', an amount of '\$0.00', and a duration of '0'. The 'Comparison Frequency' is set to 'Annual' and the 'Eligibility Guideline Amount' is '\$0.00'.



The screenshot shows the 'Family Income' form after data entry. 'Family Size' is 2, 'No. of Expected Infants' is 1, and 'Total Family Size' is 3. A green checkmark and the text 'Family Eligible' are displayed at the top right. Under 'Family - Adjunct Participation', 'Robin Raven' is selected. 'Self Declared Income' is '\$30,000.00'. The 'Income Details' table has one row: 'Salary' with 'Pay stubs/statement/tip sheet' as proof, a frequency of 'Twice-Monthly', an amount of '\$1,250.00', and a duration of '24'. The 'Comparison Frequency' is 'Twice-Monthly', 'Total Income' is '\$1,250.00', and 'Eligibility Guideline Amount' is '\$1,506.00'.

**Family Eligible**



- 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.

**Family Income** ?

**Family Size** ★ **No. of Expected Infants** **Total Family Size** **Family Eligible**  
2 1 3 ✘ Ineligible - Total amount exceeds Guidelines

**Family - Adjunct Participation**

	SNAP	Medicaid	TANF	School Lunch
Robin Raven	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Self Declared Income** OR **Self Declared Income Range**

**Income Details** Total Items: 1 ?

	Source	Proof	Frequency	Amount	Duration
✘	Salary	Pay stubs/statement/tip sheet	Twice-Monthly	\$1,600.00	24

**Zero Income Declaration Reason** **Comparison Frequency** **Total Income** **Eligibility Guideline Amount**  
 Twice-Monthly \$1,600.00 \$1,506.00

**Income History** ?

Family Ineligible- Total amount exceeds Guidelines

**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.

Income Details

Source	Proof	Frequency	Amount	Duration
Salary	Proof Provided with Affidavit	Twice-Monthly	\$1,250.00	24

Zero Income Declaration Reason:

Comparison Frequency: Twice-Monthly

Total Income: \$1,250.00

Eligibility Guideline Amount: \$1,506.00

- 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.

Quick Links

New Family

Family Search

Certification

- Family Demographics
- Family Assessment
- Participant Demographics
- Income Information
- Health Information
- Anthro / Lab
- Eco-Social Assessment
- Dietsary & Health
- Assigned Risk Factors
- Certification Signature

Certification Signature

Certification Summary

Identification Document

Family Alerts

Notes

Scanned Documents

Care Plan

Issue Benefits

Journal of Transactions

Subsequent Certification

Scheduling System

Family Appointments

Quick Appointments

Clinic Master Calendar

Raven Family  
Family ID: F18200013449  
157 Baltimore Drive  
WRIGHTSVILLE BEACH, NC 28400

Robin Raven  
Participant ID: 9540111324  
Age: 23 years and 11 months  
WIC Category: Pregnant

Certification Signature

Signature for

Rights and Responsibilities

Affidavit for Identity

Affidavit for Income

Release of Information

Certification Documents

Rights and Responsibilities

Affidavit for Income

- 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.

**Certification Signature**

Signature for

Rights and Responsibilities

Affidavit for Identity

Affidavit for Residency

Affidavit for Income

Release of Information

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**Certification Documents**

▶ Rights and Responsibilities

▼ Affidavit for Income

**AFFIDAVIT ATTESTING TO INCOME  
FOR  
WOMEN, INFANTS, AND CHILDREN (WIC) BENEFITS**

954011132N

The North Carolina WIC Program requires each applicant to show proof of income to apply for the WIC Program. Please read the following statement before completing this form.

I understand that by completing, signing, and dating this form I am certifying that the information I am providing is correct. I understand that intentional misrepresentation may result in paying the State agency, in cash, the value of the food benefits

Capture Signature    Cancel

**Certification Signature**

Signature for

Rights and Responsibilities

Affidavit for Identity

Affidavit for Residency

Affidavit for Income

Release of Information

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**Certification Documents**

▼ Affidavit for Income

REASON FOR LACK OF PROOF OF INCOME

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(Applicant/Participant/Parent/Guardian/Caretaker Signature)

Capture Signature    Cancel

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

**Raven Family**  
 Family ID: F18200013449  
 157 Baltimore Drive  
 WRIGHTSVILLE BEACH, NC 28480

**Robin Raven**  
 Participant ID: 954011132N  
 Age: 23 years and 11 months  
 WIC Category: Pregnant

**Family Income**  
 Family Size: 2, No. of Expected Infants: 1, Total Family Size: 3, Family Eligible: ✓

**Family - Adjunct Participation**

	SHAP	Medicaid	TANF	School Lunch
Robin Raven	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Self Declared Income: \$30,000.00 OR Self Declared Income Range: [dropdown]

**Income Details**

Source	Proof	Frequency	Amount	Duration	Total Items: 1
Salary	Proof Provided with Affidavit	Twice-Monthly	\$1,250.00	24	

Zero Income Declaration Reason: [dropdown] Comparison Frequency: Twice-Monthly Total Income: \$1,250.00 Eligibility Guideline Amount: \$1,506.00

**Income History**

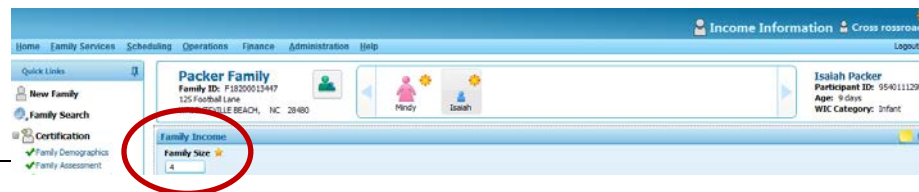
Buttons: Scan Document, View Documents, Save, Cancel, Print Ineligibility Notice

## 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.





### 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 Income				
Family Size 				
4				
Family - Adjunct Participation				
	SNAP	Medicaid	TANF	School Lunch
Mindy Packer	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input type="checkbox"/>	<input type="checkbox"/>
Isiah Packer	<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 	<input type="checkbox"/>	<input type="checkbox"/>

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.

Colt Family  
Family ID: F18200013490  
125 Football Lane  
WISCONSINVILLE BEACH, NC 28480

Carson Colt  
Participant ID: 9540111607  
Age: 3 years and 11 months  
WIC Category: Child

Family Size: 3

Family - Adjunct Participation	SNAP	Medicaid	TANF	School Lunch
Carson Colt	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Self Declared Income  OR Self Declared Income Range

Source	Proof	Frequency	Amount	Duration	Total Items: 0

Zero Income Declaration Reason  Comparison Frequency Annual Total Income \$0.00 Eligibility Guideline Amount \$36,131.00

Family Income

Family Size: 3


Family - Adjunct Participation	SNAP	Medicaid	TANF	School Lunch
Carson Colt	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Self Declared Income  OR Self Declared Income Range

Source	Proof	Frequency	Amount	Duration	Total Items: 0

Zero Income Declaration Reason  Comparison Frequency Annual Total Income \$0.00 Eligibility Guideline Amount \$36,131.00

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 Football Lane  
WRIGHTSVILLE BEACH, NC 28480

**Carson Colt**  
Participant ID: 9540111607  
Age: 3 years and 11 months  
WIC Category: Child

**Family Income**  
Family Size: 3

Family - Adjunct Participation

	SNAP	Medicaid	TANF	School Lunch
Carson Colt	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Self Declared Income OR Self Declared Income Range

Income Details

Source	Proof	Frequency	Amount	Duration
Total Items: 0				

Zero Income Declaration Reason: **No Income** (highlighted in red box)

Comparison Frequency: Annual

Total Income: \$0.00

Eligibility Guideline Amount: \$36,131.00

**Colt Family**  
Family ID: F18200013450  
125 Football Lane  
WRIGHTSVILLE BEACH, NC 28480

**Carson Colt**  
Participant ID: 9540111607  
Age: 3 years and 11 months  
WIC Category: Child

**Family Income**  
Family Size: 3 **Family Eligible** (highlighted in red box)

Family - Adjunct Participation

	SNAP	Medicaid	TANF	School Lunch
Carson Colt	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Self Declared Income OR Self Declared Income Range

Income Details

Source	Proof	Frequency	Amount	Duration
Total Items: 0				

Zero Income Declaration Reason: **No Income**

Comparison Frequency: Annual

Total Income: \$0.00

Eligibility Guideline Amount: \$36,131.00

Scan Document View Documents **Save** (highlighted in red box) Cancel Print Eligibility Notice

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