# Income – Documenting

**This list is not all-inclusive. If you have questions, please contact OHCS Program Analysts.**

| **Applicable Program** | **Type of Income** | **Include in Income Calculation?** | **Acceptable Types of Documentation** | **Documentation** |
| --- | --- | --- | --- | --- |
| **EHA, ERA, ESG, HSP, HTBA** | **Wages, salary,****etc.** | Yes | Copy of most recent paystub(s) | * Obtain copy(ies) of most recent pay stub(s) from applicant.
* Include copy(ies) in participant file.
 |
| **OR** |
| Written verification of income. | * Mail, fax, email written verification of income request directly to employer(s).
* Obtain signed and dated verification of income from employer(s).
* Include verification of income in file.
 |
| **OR***(if written third-party documentation cannot be obtained)* |
| Oral verification of income.  | * Contact employer(s) by phone or in person to obtain oral verification.
* Document oral verification of income.
* Include verification of Income in file.
 |
|  **OR***(if written documentation or oral third-party verification is not obtained)* |
| Self-declaration of income.  | * Obtain signed and dated original self-declaration of income from applicant.
* Worker documents attempt to obtain third-party verification (written or oral) and signs self-declaration of income.
* Include self-declaration of income in file.
 |
| **EHA, ERA, ESG, HSP, HTBA** | **Business income1** | Yes | Copy of most recent federal or state tax return showing net business income | * Obtain copy of most recent federal or state tax return from applicant.
* Include copy in file.
 |
| **OR***(if written documentation cannot be obtained)* |
| Self-declaration of income.  | * Obtain signed and dated original self-declaration of income from applicant.
* Worker documents attempt to obtain third-party verification (written or oral) and signs self-declaration of income.
* Include self-declaration of income in file.
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|  | 1 It can be a challenge for grantees and sub-grantees to obtain third-party verification of self-employment income. When third-party verification is not available, sub-grantee should request a notarized tenant declaration that includes a perjury statement. |
| **EHA, ERA, ESG, HSP, HTBA** | **Interest and dividend****income** | Yes | Copy of most recent interest or dividend income statement | * Obtain copy(ies) of most recent interest or dividend income statement from applicant.
* Include copy(ies) in file.
 |
| **OR** |
| Copy of most recent federal or state tax return showing interest, dividend or other net income | * Obtain copy of most recent federal or state tax return from applicant.
* Include copy in file.
 |
| **OR***(if written documentation cannot be obtained)* |
| Self-declaration of income.  | * Obtain signed and dated original self-declaration of income from applicant.
* Worker documents attempt to obtain third-party verification (written or oral) and signs self-declaration of income.
* Include self-declaration of income in file.
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| **EHA, ERA, ESG, HSP, HTBA** | **Pension and/or retirement****income** | Yes | Copy of recent statement or benefit notice from Social Security Administration (SSA), pension provider, or other source | * Obtain copy(ies) of most recent benefit notice, pension statement or other payment statement from applicant.
* Include copy(ies) in file.
 |
| **OR** |
| Written verification of income. | * Mail, fax, email verification of income request directly to Social Security, pension provider or other source.
* Obtain signed and dated verification of income from income source.
* Include Verification of Income in file.
 |
| **OR***(if written third party documentation cannot be obtained)* |
| Oral verification of income.  | * Contact source(s) by phone or in person to obtain oral verification of income.
* Document oral verification of income.
* Include Verification of Income in file.
 |
| **OR***(if written documentation or oral third-party verification cannot be obtained)* |
| Self-declaration of income.  | * Obtain signed and dated original self-declaration of income from applicant.
* Worker documents attempt to obtain third-party verification (written or oral) and signs self-declaration of income.
* Include self-declaration of income in file.
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| **EHA, ERA, ESG, HSP, HTBA** | **Unemploy-ment and disability income** | Yes | Copy of most recent unemployment,worker’s compensation, SSI, SSDI, orseverance payment statement or benefit notice | * Obtain copy(ies) of most recent payment statement(s) and/or benefit notice(s) from applicant.
* Include copy(ies) in file.
 |
| **OR** |
| Written verification of income. | * Mail, fax, email verification of income request directly to unemployment administrator, worker’s compensation administrator, or former employer.
* Obtain signed and dated verification of income from income source.
* Include verification of income in file.
 |
| **OR***(if written third party documentation cannot be obtained)* |
| Oral verification of income.  | * Contact source(s) by phone or in person to obtain oral verification of income.
* Document oral verification of income.
* Include Verification of Income in file.
 |
| **OR***(if written documentation or oral third-party verification cannot be obtained)* |
| Self-declaration of income.  | * Obtain signed and dated original self-declaration of income from applicant.
* Worker documents attempt to obtain third-party verification (written or oral) and signs self-declaration of income.
* Include self-declaration of income in file.
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| **EHA, ERA, ESG, HSP, HTBA** | **TANF/ public****assistance** | Yes | Copy of most recent TANF payment statement or benefit notice | * Obtain copy(ies) of most recent benefit notice(s) or payment statement(s) from applicant.
* Include copy(ies) in file.
 |
| **OR** |
| Written verification of income.  | * Mail, fax, email verification of income request directly to TANF administrator.
* Obtain signed and dated verification of income from income source.
* Include verification of income in file.
 |
| **OR***(if written third party documentation cannot be obtained)* |
| Oral verification of income.  | * Contact source(s) by phone or in person to obtain oral verification of income.
* Document oral verification of income.
* Include Verification of Income in file.
 |
| **OR***(if written documentation or oral third-party verification cannot be obtained)* |
| Self-declaration of income.  | * Obtain signed and dated original self-declaration of income from applicant.
* Worker documents attempt to obtain third-party verification (written or oral) and signs self-declaration of income.
* Include self-declaration of income in file.
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| **EHA, ERA, ESG, HSP, HTBA** | **Armed Forces income** | Yes | Copy of pay stubs, payment statement, or other government-issued statement indicating income amount | * Obtain copy(ies) of most recent payment stubs(s), statements, or other government-issued statement from applicant.
* Include copy(ies) in file.
 |
| **OR** |
| Written verification of income.  | * Mail, fax, email verification of income request directly to appropriate armed services representative.
* Obtain signed and dated verification of income from income source.
* Include Verification of Income in file.
 |
| **OR***(if written third-party documentation cannot be obtained)* |
| Oral verification of income.  | * Contact source(s) by phone or in person to obtain oral verification of income.
* Document oral verification of income.
* Include Verification of Income in file.
 |
| **OR***(if written documentation or oral-third party verification cannot be obtained)* |
| Self-declaration of income.  | * Obtain signed and dated original self-declaration of income from applicant.
* Worker documents attempt to obtain third-party verification (written or oral) and signs self-declaration of income.
* Include self-declaration of income in file.
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| **EHA, ERA, ESG, HSP, HTBA** | **No Income Reported** | N/A | Self-declaration of income.  | * Obtain signed and dated original self-declaration of income from applicant.
* Worker documents attempt to obtain third-party verification (written or oral) and signs self-declaration of income.
* Include self-declaration of income in file.
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