



## Memorandum

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**#12-066**

**TO:** WIC Regional Directors  
WIC Local Agency Directors

**FROM:** Linda Brumble, Unit Manager  
Nutrition Education/Clinic Services Unit  
Nutrition Services Section

**DATE:** June 27, 2012

**SUBJECT:** Policy Memo – New/Revised Policies and forms: *Texas WIC Policy CS:05.0 Identification of WIC Applicant/Participant and Parent or Caregiver; Texas WIC Policy CS:06.0 Residency as a Certification Requirement; Texas WIC Policy CS:07.0 Income Screening as a Certification Requirement; Texas WIC Policy CS:08.0 Adjunctive Income Eligibility; Texas WIC Policy CS:12.0 Texas WIC Income Guidelines; Texas WIC Policy CS:14.0 Completion of the WIC Income Questionnaire and the Family Certification Form/WIC Program Screening Form; Texas WIC Policy IM:11.0 Screening and Referral for Immunizations*

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This memo announces revisions to the subject policies as follows. The policies are effective July 1, 2012. At that time they will be posted and you may update your *Policy and Procedures Manual* by accessing the *WIC Website* at:

[http://www.dshs.state.tx.us/wichd/policy/toc\\_cs.shtm](http://www.dshs.state.tx.us/wichd/policy/toc_cs.shtm)

[http://www.dshs.state.tx.us/wichd/policy/toc\\_im.shtm](http://www.dshs.state.tx.us/wichd/policy/toc_im.shtm)

### **Summary of Revisions**

*Texas WIC Policy CS:05.0 Identification of WIC Applicant/Participant and Parent or Caregiver*

- Procedure II.A. Added electronic proof is acceptable.
- Procedure II.A.12.f. Revised to include Social Security Administration letters.
- Procedure II.A.12.m. Added YTBC to the list of acceptable forms of identity

*Texas WIC Policy CS:06.0 Residency as a Certification Requirement*

- Procedure II. Changed wording to: The applicant may present a copy of the original document or proof obtained by viewing an electronic device or a printout for bills paid online.

*Texas WIC Policy CS:07.0 Income Screening as a Certification Requirement*

- Procedure I.A. added applicant or parent/guardian
- Procedure I.B.1. Added authorized adult to signature on WIC-35
- Procedure II. B. Delete divide the income by the number of month

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- Procedure II. L. Deleted divide the amount by the number of months
- Procedure II. L. Added where to record the lump sum/new money amount on the WIC-35
- Procedure III. Deleted calculated client's monthly income
- Procedure III. A. Added income can be calculated by using YTD or by using more than one check stub.
- Procedure III.C. added instructions for same pay frequency and new income conversions, including how to enter amounts in TWIN
- Procedure III.D. added instructions for different pay frequency and new income conversions, including how to enter amounts in TWIN
- Procedure IV.A. Changed definition of overtime under exceptions
- Procedure IV.B. Added instructions for calculations when income varies and an example
- Procedure IV. C. Information about the self-declaration was changed to letter C.
- Procedure IV.D. Added instructions for the following exceptions which require staff to convert income to annual: unpaid leave status, reduced pay leave status, teachers who are paid on a 10-month basis, and college students who only work during the summer.
- Procedure VIII. Deleted this section, explained in III.C & D.
- Procedure IV.A.2. Changed to say a participant reporting an increase in income will trigger a reassessment
- Procedure X.B. Deleted monthly from the household's gross income
- Procedure X.E.1.

*Texas WIC Policy CS:08.0 Adjunctive Income Eligibility*

- Added definitions for Provider Help Desk for Your Texas Benefits Card and Your Texas Benefits Card (YTBC).
- Procedure I.B.1. Added electronic proof is acceptable and a copy of the gateway document is not required.
- Procedure I.B.2. Added phone verification through the Provider Helpdesk for YTBC may be used when an applicant presents their YTBC. Also added the phone numbers for the Texas Health and Human Services Commission (HHSC) AVR and Provider Help Desk for YTBC.
- Procedure I.E.3.b. Removed requirement that written statement include the individual's address and telephone number.
- Revised Note under Procedure I.G. to indicate a pregnant woman's Medicaid eligibility ends on the last day of the second month after her pregnancy terminates; therefore, the infant could be determined eligible based on the mother's Medicaid until two months of age. Revised example to indicate staff shall document the name of the gateway recipient on the WIC-35 per CS:14.0.

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- Procedure IV. Revised statement to indicate staff shall document the gateway client identification or case number on the WIC-35 for all applicants determined adjunctively income eligible. Revised wording on documenting on-line and phone verifications of gateway participation.

*Texas WIC Policy CS:12.0 Texas WIC Income Guidelines*

- Changes guidelines to reflect 2012 income guidelines.

*Texas WIC Policy CS:14.0 Completion of the WIC Income Questionnaire and the Family Certification Form/WIC Program Screening Form*

- Procedure I. Revised statement to clarify the WIC Income Questionnaire (WIC-35-3) shall be completed by the applicant or parent/guardian.
- Procedure I.D. Added information is required each time income is screened, at certifications and income reassessments.
- Procedure II.B. Added when the applicant or parent/guardian provides written authorization for another adult to attend the certification appointment, the individual should be listed as Parent/Guardian #2.
- Reformatted the order of procedures II.P. through II.U. in order to be consistent with the Family Certification Form (WIC-35).
- Procedure II.P. Revised example to indicate when YTBC is presented, staff shall verify current Medicaid eligibility as indicated in CS:08.0 Procedure I.B.2. and complete the Gateway Verification section of the WIC-35.
- Procedure III.A.1. Added authorized adult.
- Procedure III.A.3. Revised statement to indicate the applicant's gateway client identification or case number shall be documented.
- Moved statement regarding phone, automated or online gateway verification to Procedure III.A.4.
- Procedure III.B.2.e. Revised to indicate calculate the annual income for the household members when the sources of income are on different pay frequencies.
- Procedure III.B.2.f. Revised to indicate record the income for the household members when the sources of income are on the same pay frequency
- Procedure III.B.2.h. Revised to indicate add the income entries together and record the total. Visually compare the total from the different pay frequency or same pay frequency column to the WIC Income Guidelines.
- Procedure III.B.2.i. Revised for staff to place a check mark in the appropriate reply box, Yes or No for the question Meets Income Guidelines.

*Identification of WIC Applicant/Participant and Parent or Caregiver; Texas WIC Policy CS:06.0 Residency as a Certification Requirement; Texas WIC Policy CS: 07.0 Income Screening as a Certification Requirement; Texas WIC Policy CS: 08.0 Adjunctive Income Eligibility; Texas WIC Policy CS:12.0 Texas WIC Income Guidelines; Texas WIC Policy CS:14.0 Completion of the WIC Income Questionnaire and the Family Certification Form/WIC Program Screening Form Texas WIC Policy IM:11.0 Screening and Referral for Immunizations*

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- Procedure III.B.2.j. Revised to indicate staff shall divide the annual income by 12 months and record the monthly income. The monthly income shall only be entered in TWIN when the applicant is eligible.
- Procedure III.B.2.m. Added when a family with special health care needs has authorized another adult to attend the initial or sub-certification, the authorized adult shall sign and date the form. Authorized adults for other participants can only attend sub-certifications and shall sign and date the form at that time.
- Procedure VI. Added copies of income document(s) are only required for applicants not adjunctively income eligible.

*Texas WIC Policy IM:11.0 Screening and Referral for Immunizations*

- The title of the policy has changed from Local Immunization Plan to Screening of and Referral for Immunizations.
- The purpose of the policy has changed from requiring local agencies to submit an annual immunization plan to requiring local agencies to screen the immunization records of all infant and children applicants/participants and to make referrals when necessary.
- Instead of screening and documenting all children's immunization records at every WIC visit, records will be screened for infant and children applicants/participants at certification and mid-certification assessment appointments.
- Since WIC clinics will no longer be providing immunizations after September 30, 2012, it will not be necessary for clinic staff to send immunization reminders to parents/care-givers. This statement has been deleted.
- Since WIC clinics will no longer be providing immunizations after September 30, 2012, it will not be necessary for clinic staff to coordinate benefits issuance with provision of immunizations. This statement has been deleted.
- Local agencies will be required to designate which staff members are responsible for the screening of immunization records. Staff will need to document whether records are available or not available, current or not current on participant certification forms and in the Texas WIN system. If records are not available, staff will need to remind participants to bring their records to their next certification/mid-certification assessment appointments. If records are not current, staff will need to refer participants to local immunization providers.
- Information on timely immunizations shall be provided to participants either by providing them with a DSHS immunization schedule or by posting a schedule in the clinic for participants to view.
- Local agencies are required to provide a listing of immunization providers in the community.

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*Family Certification Form, stock number WIC-35* – Local Agencies will be receiving an advance shipment of the WIC-35 from Business Ink, but only in limited quantities.

- Family Certification Form Side 1:
  - When YTBC is presented, staff shall check or circle number 16 under Gateway Income Method and verify current Medicaid eligibility as indicated in CS:08.0 Procedure I.B.2. Staff then completes the Gateway Verification section of the WIC-35.
- WIC Program Income Screening Side 2:
  - Applicant's or Parent's/Guardian's signature at the bottom of side 2 now includes Authorized Adult. Per CR:07.0, Provision of Services to Families with Special Health Care Needs, families with Special Health Care Needs may authorize another adult to attend the initial or sub-certification appointment.
  - Two columns have been combined, "Employer's Name and/or WIC Form Number (if applicable)", and "Employer's Address (physical or city)".
  - Staff shall record income in the "Different pay frequency/Annual" column when there are different pay frequencies in the household or client is on unpaid leave status, reduced pay leave status, teacher paid 10 months a year and college students working during the summer. All income must be converted to annual.
  - Staff shall record income in the "Same pay frequency" column when the household income is on the same pay frequency.
  - "Annual Total" or "Total" (#1) is where staff will add the income entries from the different pay frequencies or the same pay frequency columns and record the total in the box. Compare the total to the appropriate household size and WIC Income Guidelines.
  - Check "Yes" or "No" if the applicant meets the WIC Income Guidelines (#1a). If the applicant meets the WIC Income Guidelines and you are using the "Different pay frequency/Annual" Column, divide the amount by 12 and record the amount in the box (#2). If the client meets the WIC Income Guidelines and you are using the "Same pay frequency" column, determine the annual amount using the appropriate income conversion factor, divide the amount by 12 and record that amount in the box (#2). This is the number you will enter in TWIN after you drop the change. If the applicant does not meet the WIC Income Guidelines refer to Policy CS:23.0 Notification of Ineligibility, Termination, or Expiration of Eligibility.

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- Gateway verification:
  - Added Client ID

If you have any questions or require additional information regarding *Texas WIC Policy CS:05.0 Identification of WIC Applicant/Participant and Parent or Caregiver, Texas WIC Policy CS:06.0 Residency as a Certification Requirement, Texas WIC Policy CS:07.0 Income Screening as a Certification Requirement, Texas WIC Policy CS:08.0 Adjunctive Income Eligibility, Texas WIC Policy CS:12.0 Texas WIC Income Guidelines, Texas WIC Policy CS:14.0 Completion of the WIC Income Questionnaire and the Family Certification Form/WIC Program Screening Form* or the *Family Certification Form*, please contact Rachel Edwards, Manager, WIC Information Response Management at (512) 341-4400 extension 2263, or [rachel.edwards@dshs.state.tx.us](mailto:rachel.edwards@dshs.state.tx.us) or Megan Downing, WIC Information Response Management, at (512) 341-4400 extension 2349, or [megan.downing@dshs.state.tx.us](mailto:megan.downing@dshs.state.tx.us). If you have questions or require additional information regarding *Texas WIC Policy IM:11.0 Screening and Referral for Immunizations* please contact Liz Bruns, Nutrition Training Specialist, at (512) 341-4585, or [elizabeth.bruns@dshs.state.tx.us](mailto:elizabeth.bruns@dshs.state.tx.us).

Attachments

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Effective July 1, 2012

Policy No. CS:05.0

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**Identification of a WIC Applicant/Participant and  
Parent or Guardian**

**Purpose**

To ensure program benefits are provided to the correct individual.

**Authority**

7 CFR Part 246.7; 25 TAC §31.22

**Policy**

The local agency (LA) staff shall check the identification of each applicant/participant and parent/guardian applying on behalf of an infant and/or child at each certification and when issuing benefits other than at certification.

**Procedures**

- I. At each certification, LA staff shall request and check the identification of each applicant and parent/guardian. Documentation of identification shall be entered on the Family Certification Form, WIC-35, and the appropriate Participant Form. A copy of the document(s) used for proof of identity shall not be kept in the applicant's/participant's file.
  - A. The following shall be accepted as documentation of identity regardless of the age of the document. A copy of the original document or proof obtained by viewing an electronic device is acceptable.
    1. Birth certificate;
    2. Hospital records (for example, crib card, hospital band, discharge papers);
    3. Baptismal certificate;
    4. Marriage license;
    5. Driver's license;

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6. WIC Lone Star Card or other States' WIC Identification Cards;
  7. Immunization card;
  8. School/employee Identification card with picture;
  9. Military Identification card;
  10. Official Identification with picture;
  11. Passport/immigration records; or
  12. Other - the following shall be accepted as proof of identification, checked as "Other" and the blank filled in on the WIC-35:
    - a. Medicaid, SNAP, TANF letters/forms (the applicant must be identified as the recipient of the program);
    - b. Health care identification
    - c. Employee check stub with name printed on it;
    - d. Voters registration card;
    - e. LA clinic card;
    - f. Social Security Administration letters;
    - g. Social Security card;
    - h. Housing/rental agreement;
    - i. Loan papers from Bank/Finance Company, etc;
    - j. Property tax receipt;
    - k. Self Declaration Form; or
    - l. Foster Placement Letter
    - m. Your Texas Benefits Card (YTBC)
- B. If an LA wants to use other documents to establish identity, the LA shall develop a policy and submit it to the state agency (SA) for approval prior to implementation. The policy shall be available for audit/review.
- II. Applicants or parents/guardians who may require an exemption include victims of theft, loss, or disaster.
- A. Applicants or parents/guardians applying on behalf of a child shall complete a Self Declaration Form.
  - B. The Self Declaration Form shall be filed in the client's record.

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- III. When issuing benefits, other than at certification, request the WIC Lone Star card. If the participant or parent/guardian does not bring the WIC Lone Star Card, he/she shall be rescheduled within the month to return with his/her card. Benefits cannot be issued without the WIC Lone Star Card.
- A. Confirmation that the WIC Lone Star Card belongs to the participant will be verified by the participant's entry of the correct personal identification number (PIN) in the PIN checker or the reader/writer equipment.
  - B. If the participant has permanently lost the WIC Lone Star Card, refer to **Policy CS: 26.0**.

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Policy No. CS:06.0

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**Residency as a Certification Requirement**

**Purpose**

To ensure that those applying for WIC benefits reside within Texas.

**Authority**

7 CFR Part 246.2, 246.7; 25 TAC §31.22

**Policy**

At certification, the applicant shall provide proof of residency within Texas.

**Definitions**

Residency: location or address where applicant routinely lives or spends the night.

Homeless individual means a woman, infant, or child who lacks a fixed and regular nighttime residence; or whose primary nighttime residence is:

- I. a supervised publicly or privately operated shelter (including a welfare hotel, a congregate shelter, or a shelter for victims of domestic violence) designated to provide temporary living accommodation;
- II. an institution that provides a temporary residence for individuals intended to be institutionalized;
- III. a temporary accommodation in the residence of another individual not exceeding 365 days; or
- IV. a public or private place not designated for, or ordinarily used as, a regular sleeping accommodation for human beings.

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Homeless facility means the following types of facilities which provide meal service:

- I. a supervised publicly or privately operated shelter (including a welfare hotel or congregate shelter) designed to provide temporary living accommodations;
- II. a facility that provides a temporary residence for individuals intended to be institutionalized; or
- III. a public or private place not designed for, nor normally used as, a regular sleeping accommodation for human beings.

Institution means any residential accommodation which provides meal service, except private residences and homeless facilities.

Family means a group of related or non-related individuals who are living together as one economic unit, except residents of a homeless facility or an institution shall not all be considered as members of a single family.

**Procedures**

- I. At each certification, the WIC applicant/parent/guardian shall provide proof of residency to verify the family resides within Texas before being screened for WIC services. Only one document is required for all applicants.
  - A. Residency verification shall be documented on the Family Certification Form/WIC Program Income Screening Form (WIC-35). Refer to **Policy CS: 14.0** for instructions on completing the WIC-35.
  - B. A copy of the document used for proof of residency shall NOT be kept in the applicant/participant's file unless the proof is a WIC form or shelter documentation.
- II. Written proof (including the applicant/participant's name and street address/rural route number, city, state and zip code) is the preferred method of documentation. Documents addressed to the applicant's

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spouse are acceptable. Minors applying for themselves and reside with their parents may present documents addressed to the parent. Documents with a P.O. Box cannot be accepted including Gateway documents. The applicant may present a copy of the original document or proof obtained by viewing an electronic device or a printout for bills paid online. The following documents shall be accepted as proof of current residency:

- A. **utility bill/credit card bill;**
- B. **rent receipt/rental agreement/letter from landlord or apartment manager;**
- C. **business letter/bill**
  - 1. any business letter (not from WIC) or any part of a business letter such as an envelope or enclosures with address or foster placement letters, bills other than utility or credit card,
  - 2. adjunctive eligibility forms from Gateway Programs: Temporary Assistance to Needy Families (TANF), Medicaid, and Supplemental Nutrition Assistance Program (SNAP), formally known as Food Stamps including phone or on-line computer system inquiries by the LA to gateway programs (See Policy CS:08.0). No P.O. Boxes can be accepted.
- D. **letter or WIC-RO2** from the person with whom the applicant(s) lives with and proof of residency:
  - 1. If the WIC applicant(s) lives with someone else and has no written proof of their residence, the individual with whom the family is living may provide a signed written statement or complete Section C of the Residency Form (WIC-RO2) confirming the living arrangements.
  - 2. Proof of residency (any documents accepted in this policy) with the individual's name and address shall also be provided.
- E. **voter registration card;**
- F. **property tax receipt;**
- G. **map and WIC-RO2** if no written proof of address exists.
  - 1. If no written proof exists and the family's residence does not have a designated address, the family may show a

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- specific location of the applicant's physical residence on a map or hand draw a map showing the location of the residence to document residency.
2. The applicant shall complete Section B of the Residency Form (WIC-R02) and attach the map. A home visit is recommended within 60 days after certification, but is not required. This is the only circumstance where Section B of the WIC-R02 shall be used.
- H. **documentation by a third party or WIC-R02;**  
If an applicant is homeless or indicates that no one in the household has proof of residency, a third party can provide a signed statement to confirm the family's living arrangements or complete Section A of the Residency Form (WIC-R02).
1. Examples of a third party include, but are not limited to: staff of a church, social service agency, legal-aid, lawyer, school staff, public health nurse, doctor, and elected public officials.
  2. The third party cannot be an employee of the WIC Program, individual related to the applicant, or a member of the applicant's household. The staff shall confirm this information verbally with the applicant.
- I. **shelter documentation;** if the family lives in a temporary shelter, the family may apply for WIC services if:
1. The family can provide documentation of residency in the shelter; and
  2. The shelter meets the following requirements:
    - a. WIC foods shall not be used in communal feedings.
    - b. The shelter shall not accrue financial or in-kind benefit from the applicant's participation in WIC.
    - c. Proxies of participants residing in a homeless facility/institution may pick up and redeem food benefits in bulk for multiple participants residing in the shelter. The LA shall ensure that adult participants are allowed to participate in the process of picking up and transacting food instruments to the greatest extent possible, within the homeless

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- facility/institutional framework, so that they are aware of the foods prescribed for them as well as the intended benefits of such foods.
- d. The shelter shall not place constraints on the ability of the applicant to partake of the WIC food instruments and all associated WIC services.
3. The LA shall ensure that the shelter meets the requirements. This may be done by having a signed letter of agreement from the shelter or by calling the shelter and verifying this information. If the LA does not have a signed letter of agreement from the shelter, document in the family record how the shelter met the criteria.
- J. **homeless (WIC-19E)** A homeless family may apply for WIC services if the family's living arrangements can be documented.
- 1. If the homeless family is unable to provide documentation from a third party verifier (see Procedure II. H.), a signed statement from the family attesting to their living conditions/situation may be provided using the Residency Verification Form for Homeless Family (WIC-19E).
  - 2. A site visit is recommended within 60 days after certification, but is not required.
- III. If the family lives in an institution, the institution shall meet the same requirements as participants living in shelters (see Procedure II.I.).
- IV. Applicants who may require an exemption include a victim of theft, loss, or disaster.
- A. Applicants or parent/guardian, applying on behalf of a child, shall complete a Self Declaration Form (no stock number - refer to WIC Policy Appendix, Required Forms, CS-Certification).
  - B. The Self Declaration Form shall be filed in the client's record.

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- V. Families who do not meet the residency requirements (live outside of Texas) shall receive written notification of ineligibility (refer to **CS:23.0**).

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Policy No. CS:07.0

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**Income Screening as a Certification Requirement**

**Purpose**

To provide documentation that an applicant's income eligibility was determined accurately.

**Authority**

7 CFR Part 246.7; 25 TAC §31.22

**Policy**

When determining program eligibility, the local agency (LA) shall determine and document the applicant's total household gross income and household size at each certification.

Applicants shall provide acceptable written documentation from the previous 60 days from the date eligibility is determined. If true income is not reflected, then income from the previous 12 months shall be considered. Only one document shall be requested for each source of income. If the applicant is currently a recipient of Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance to Needy Families (TANF), or Medicaid, refer to Policy CS:08.0.

Instream migrants with an expired Verification of Certification (VOC) shall be considered income eligible, provided their income is redetermined once every 12 months.

LAs are required to verify all information that is questionable or when verification is specifically required by this policy. In addition, an LA may require verification of any information to ensure income eligibility is determined accurately.

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## Definitions

Household: all persons, related or unrelated, living together in the same dwelling, with the exception of the following special situations: pregnant woman, foster child, individuals who qualify as a separate economic unit, and residents of a homeless facility or other residential institution.

Income: Gross income earned by all members of a household, including any amount received or withdrawn from any source, including savings, unless excluded from the definition of income by federal regulations as described in [Policy CS:09.0](#). Exception: for farmers and self-employed individuals, use net income, which is the income after the deduction of business expenses.

In-kind benefit: Benefits received by the household, which are provided in the form of goods and/or services. Example: woman resides with another family and provides childcare in exchange for food and shelter. This is exclusion to income.

Instream migrants: Migrant farm workers who follow a route or agricultural work from state to state and who are currently not at their home base.

Verification of income: A process whereby the information presented by an applicant as documentation of income is validated through an external source of information other than the applicant.

## Procedures

- I. At each certification, WIC applicants or parent/guardians applying on behalf of a child shall declare the number of persons that comprise the applicant's household size and provide acceptable documentation of the amount of ALL gross income received by each member of the household, unless the applicant is adjunctively income eligible, in which case income eligibility is determined under the provisions of [Policy CS:08.0](#).
  - A. The WIC Income Questionnaire (WIC Form 35-3) shall be completed at each certification by the applicant or

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parent/guardian. The form shall be completed prior to income determination and filed in the applicant's record with the Family Certification Form/WIC Program Income Screening Form (WIC-35). (See **Policy CS:14.0**)

1. If income has been documented for one family member within the last 60 calendar days, it may be used for other family members being certified within that 60 day period. Staff shall verbally verify income has not changed.
  2. The applicant or parent/guardian shall sign and date the WIC-35-3 near the original signatures and dates from the previous income determination.
- B. Use the WIC-35 to document total household size and monthly income. The staff person who completes this information shall sign and date the WIC-35 using their official signature. Refer to **Policy CS:14.0** for instructions on completing the WIC-35. One WIC-35 may be used to document income and household size for two or more members of a household. This form shall be easily accessible for audit/review.
1. Income shall be documented each time a family member is certified (except for instream migrants). If income has been documented for one family member within the last 60 calendar days, it may be used for other family members being certified within that 60 day period. Staff shall verbally verify income has not changed and both staff and applicant or parent/guardian or authorized adult shall sign and date the WIC-35 near the original signatures and dates from the previous income determination.
  2. The 60-day period does not apply to applicants who were adjunctively income eligible. (Refer to **Policy CS:08.0**)
- C. A copy of the income document(s) shall be kept in the applicant's file containing the WIC-35.
- II. WIC applicants shall provide acceptable **written** documentation of the amount(s) of all income received by **each** member of the household. Amounts should reflect all usual gross income. Documentation shall

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be dated within the previous 60 days of from the date of the eligibility determination. The applicant or parent/guardian may present a copy or facsimile (fax) of the original document. Exceptions are identified in this policy where written documentation is not required. Only one document shall be requested from each source of income. Acceptable documents for proof of income include:

- A. **Paycheck stubs** with the current amount of gross earnings.
  - 1. The paycheck stub must indicate the pay period or pay date and employee's name.
  - 2. Do not accept a paycheck stub that has a different name than the applicant's or household member's name. Allow applicant to complete a WIC-32, Applicant's Statement of Farm/Self-Employment Form. (See II. F. in this policy)
  - 3. The employer may be contacted, with the applicant's or parent/guardian's permission, to clarify information on the paycheck stubs. Information from the employer shall be used to determine income and documented on the WIC-35 form.
- B. **W-2 form**, valid from date issued through April 30 of the same year and is reflective of current income. Staff shall ask applicant or parent/guardian to confirm the form reflects current income and determine the average based on the date employment began.
- C. **signed statement from employer** (business letterhead is not required). The statement shall reflect current gross income, the pay period, and/or the pay date.
- D. **WIC-19a**, Assistance Documentation Form.
  - 1. Section I shall be completed when:
    - a. money or financial support is received from a source outside the household such as parents, relatives, or friends. If money is received occasionally, refer to Procedure II. L. of this policy.
    - b. there is more than one provider of assistance, each provider shall complete a separate WIC-19a.
    - c. the applicant receives financial assistance in addition

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- to their wages from someone who does not reside with them.
2. Section II shall be completed by a third party when no one in the household has a source of income and the household does not receive outside assistance.
- a. Examples of a third party include but are not limited to: staff of a church or school, social service agency, legal-aid, lawyer, public health nurse, doctor, and elected public officials.
  - b. The third-party cannot be an employee of the WIC Program, an individual related to the applicant/parent/guardian, or a member of the applicant's household. The staff shall confirm this information verbally with the applicant.
- E. **WIC-19b**, Employment Verification Form is acceptable, if the applicant and/or members of the applicant's household do not have acceptable documentation of wages. An applicant who has physically started a new job but has not received his/her first paycheck shall have a WIC-19b completed or have a statement from their employer.
- F. **WIC-32**, Applicant's Statement of Farm/Self-Employment Form, shall be completed if an applicant or a member of the household is self-employed and does not have business records. This form may also be used if an applicant is paid in cash and the employer will not provide documentation, or the applicant cannot provide a paycheck stub in his/her name.
- G. **Bank statement**, checking or savings account statement, if reflective of current gross income.  
Example: An applicant is living off their savings. The amount withdrawn monthly to pay for their expenses plus a month's worth of interest shall be considered as their monthly household income. The total dollar amount in savings is not to be considered. A bank statement within the previous 60 days shall be used as documentation of income.

Total amount of savings:	\$30,000
Monthly expenses for one month:	\$ 1,150

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One month of interest \$ 25

Total monthly income: \$1150 + \$25 = \$ 1,175

- H. **current tax records** valid through April 14th following the year it was filed (e.g. if filed in 2012, then accept through April 14th 2013). Staff shall ask applicant/parent/guardian to verbally confirm the tax record reflects current income (retain a copy of the section of the documents used to determine income).
- I. **income receipt book** or other accounting records for self-employed individuals (retain a copy of the section of the documents used to determine income).
- J. **foster child placement letter**; All foster children qualify for income eligibility. A verbal declaration of the amount paid to the family for the care of the foster child shall be obtained if the amount is not indicated on the placement letter. If a foster child receives income, whether from a job or outside financial resource, it must be counted in the income determination and documented on the WIC-35. Income screening shall be done at every certification for foster children, even if they have not changed foster homes. Mark "other" on the WIC-35 and record "placement letter" in the space provided.
- K. **Child Support and/or Alimony**; Documentation shall be obtained **in the following order** (i.e., staff shall obtain the highest level of documentation, if it exists, with #1 constituting the highest level and so forth):
  - 1. Court order, divorce decree or information from Office of Attorney General (800-252-8014);
  - 2. Receipts or copies of checks;
  - 3. Signed and dated statement from the person providing support; or
  - 4. Signed and dated statement from person receiving support.Mark "other" on the WIC-35 and record "child support or alimony" in the space provided.
- L. **Lump Sum/New Money**: New money is money received within the previous 12 months and not received on a regular basis. Examples include, but are not limited to: gifts,

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inheritance, bonuses, and lottery winnings. Record lump sum/new money amount under the Different pay frequency/Annual column on the WIC-35. Mark "other" on the WIC-35 and record the type of new money received in the space provided.

- M. **Other:** The following are acceptable as income and should be marked "other" on the type of Non-Gateway Income Method used on the WIC-35. Examples include, but are not limited to:
1. Workers Compensation letters, or Unemployment Insurance Benefits;
  2. Severance, pension payments, or retirement benefits;
  3. 401K or other investments;
  4. Social security and Supplemental Security Income (SSI) award letter; and
  5. Student financial aid.

III. An applicant's current rate of income shall be utilized to calculate income eligibility. For exceptions, refer to Procedure IV.

- A. Only one document (check stub, etc.) shall be requested for each source of income, as long as the document is from the previous 60 days of the date eligibility is determined. If income varies calculate the average using the Year-to-date amount or use more than one check stub.
- B. Documentation of income that changes only once per year; e.g., Social Security and scholarship/grant award letters may be used during the entire year the letter covers if reflective of current income.
- C. Households with one frequency of income e.g. (weekly, every 2 weeks, twice monthly, monthly)
1. Add the incomes of all household members together.
  2. The calculations should be exact without any rounding.
  3. Compare the total of all the income to the appropriate household size and pay frequency in the WIC income guidelines.
  4. When the applicant's household meets the WIC Income Guidelines, get monthly numbers to enter in TWIN with the following calculations:

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- a. If pay is weekly, multiply by 52, divide by 12, drop the change, and enter in TWIN
  - b. If pay is every two weeks, multiply by 26, divide by 12, drop the change, enter in TWIN
  - c. If pay is twice a month, multiply by 24, divide by 12, drop the change, and enter in TWIN
  - d. If pay is monthly, drop the change, enter in TWIN
  - e. If pay is yearly, divide by 12, drop the change, and enter in TWIN
5. If the applicant does not meet the WIC Income Guidelines refer to CS:23.0, Notification of Ineligibility, Termination or Expiration of Eligibility.
- D. Households with more than one pay frequency e.g. (weekly, every 2 weeks, twice monthly, monthly)
1. Convert all the income amounts to annual income using the following calculations:
    - a. when paid by the week – multiply by 52
    - b. when paid every two weeks – multiply by 26
    - c. when paid twice a month – multiply by 24
    - d. when paid monthly – multiply by 12
  2. Add the incomes together.
  3. The calculations should be exact without any rounding.
  4. Compare the annual total to the appropriate household size and annual amount in the WIC income guidelines.
  5. When the applicant's household meets the WIC Income Guidelines, convert the annual amount to a monthly total by dividing by 12. Drop any change and enter this amount in TWIN.
  6. If the applicant does not meet the WIC Income Guidelines refer to CS:23.0, Notification of Ineligibility, Termination or Expiration of Eligibility.

IV. Exceptions include the following:

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- A. Overtime: If the overtime pay was a one-time occurrence, use the normal wages paid to calculate income, do not include the overtime.
- B. Income Varies: The income average is a better reflection of the applicant's true income.
  - 1. First calculate the average by using the year-to-date (YTD) amount or by averaging more than one check stub together.
  - 2. When there is only one pay frequency, compare the average income to the appropriate frequency in the WIC Income Guidelines.
  - 3. When there is more than one pay frequency, use income average to convert to an annual amount. Convert all other household members to an annual amount. Compare to the annual WIC Income Guidelines.

Example: Ann is paid weekly and her pay varies. Her husband is paid \$2035 a month. Ann's last 2 checks were \$234, \$152.  
 $234 + 152 = 386 / 2 = \$193$  Ann's avg. weekly amt.  
 $193 \times 52 = 10036$  Ann's annual amount  
 $2035 \times 12 = 24420$  Husband's annual income  
 $10036 + 24420 = \$34456$  (this annual amount is compared to the WIC Income Guidelines)

- C. Self Declaration: An applicant or a parent/guardian applying on behalf of a child, who may be a victim of theft, loss, or disaster and do not have a source of income shall complete a Self-Declaration form. This form shall be filed In the client's record.

**D. For the following exceptions –convert all household income to an annual amount and compare to the annual amount in the WIC Income Guidelines. Record all annual amounts under “different pay frequencies/Annual” column on the WIC-35.**

- 1. Unpaid leave status: (e.g., Family Medical Leave Act (FMLA) or persons on strike) Employed persons on unpaid leave status at the time of application shall be required to bring in the most recent paycheck stub prior to leave status. If the gross amount on the check stub is not reflective of true income, it is best to

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determine the average of the previous earnings. As the employee is expected to return to work, income must be projected for the remainder of the year.

Example: Paid status 9 months x \$1000/month(\$9000)  
+Unpaid leave 3 months x \$0/month(\$0)  
= \$9000

2. Reduced pay leave status:  
Current documentation of regular and reduced pay shall be provided. Take the reduced rate of pay and multiply by the number of months on reduced pay. Add the remaining months in the year at regular pay.  
Example: Reduced Pay 4mo. X \$400/mo.(\$1600)  
+Regular Pay 8mo. X \$800/mo.(\$6400)  
= \$8000
- 3.. Teachers who are paid on a 10-month basis: Use the gross annual salary of the teacher as their income.
4. College students who only work during the summer months and/or their school breaks: Use the gross annual salary of the student as their income..

- V. Income eligibility of migrants:
  - A. Certain instream migrant families with an expired Verification of Certification (VOC) shall be considered income eligible if income eligibility was determined within the previous 12 months. The date the migrant family's income was last determined shall be documented on the Family Certification Form (WIC-35).
  - B. The income eligibility of migrant families who are not instream, defined as migrant farmworkers at their home base, shall be determined and documented on form WIC-35 at each certification.
- VI. To assess the income eligibility of an unemployed person (whether the person quit, was fired, or experienced a lay-off) all amounts of financial support received from any of the sources listed in this policy shall be determined and appropriate documentation obtained. If the person is living off their savings refer to II. G. of this policy.

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- VII. Income eligibility of pregnant women: Refer to **Policy CS: 10.0**, Economic Unit for Income.
- VIII. The LA has no responsibility to monitor the continued income eligibility of the participant during the current WIC certification period.
- IX. Participants are not required to report income changes within certification periods nor are LAs required to inquire about such changes. However, if information is provided by any party during a certification period, which suggests ineligibility due to income, a reassessment of program eligibility shall be conducted during the certification period unless the information concerns possible program fraud or abuse. When fraud or abuse is suspected, refer to Policy GA: 12 for instructions on reporting to the state agency. Reassessments are not required when there are 90 days or less before the expiration of the certification period. If the individual is determined ineligible, the LA shall disqualify the individual and any other family members participating in WIC at the time of the reassessment.
- A. Some examples of situations which trigger a mandatory reassessment by the LA include:
1. family member certified and income or adjunctive income eligibility has changed;
  2. an increase in income reported by a participant;
  3. a change in custody and/or household size; and/or
- B. Have the participant bring documentation of their continued income eligibility or eligibility in the gateway program to their next appointment.
1. the individual shall be issued one month of benefits (refer to **Policy CS: 23.0**) and be required to bring documentation to the next appointment.
  2. if the individual fails to bring the proof of income or participation in the gateway program, the individual and

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- other family members participating in WIC at the time of the reassessment shall be disqualified from the Program.
- C. If the individual is income eligible through adjunctive eligibility, refer to **Policy CS: 08.0**.
  - D. Refer to **Policy GA: 12.0** for instructions on handling citizen complaints about a participant's eligibility.
  - E. Refer to **Policy CR: 03.0** for guidance on a participant's right to appeal any decision, which results in the denial, disqualification, or termination of their right to participate in the Program.
  - F. LA staff shall provide written notification of termination to participant(s) found ineligible. Refer to **Policy CS: 23.0** for instructions.
- X.. Special Circumstances for income eligibility of a military family when parent(s) is deployed during times of crisis or on temporary assignment.
- A. Military personnel absent (e.g., deployed overseas) shall be counted as members of the household.
  - B. Whenever possible, a recent (within the past 120 days) Leave Earnings Statement (LES) shall be obtained as documentation of the soldier's contribution to the household's gross income. If the funds are direct deposited into a bank account in lieu of having an LES statement, request a bank statement from the applicant. The applicant shall document the amount of gross income. The statement shall be signed by the applicant/parent/guardian and include a statement explaining why he/she cannot provide documentation of income.
  - C. Income exclusions when parent(s) is deployed:
    - 1. Basic Allowance for Housing (BAH), Family Separation Housing (FSH), and Overseas Housing Allowance (OHA).
    - 2. Cost of Living Allowance (COLA) only if the military person resides outside the continental United States.
    - 3. Family Subsistence Supplemental Allowance (FSSA) payments to members of the Armed Services provided by the Department of Defense under the provisions of Public

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Law 109-163, the National Defense Authorization Act for Fiscal Year 2006.

- D. Other types of Entitlement pay, including, but not limited to Combat Pay and Hostile Fire Pay, can be excluded from income. The pay:
- a) Must have been received in addition to basic pay
  - b) Must have been received as a result of deployment to or service in an area that is designated a combat zone
  - c) Must not have been received prior to deployment
- E. The Local Agency needs to explore the circumstances under which military service personnel is receiving each additional allowance in order to decide if they should include or exclude the payment. The requirements above, XI.D., need to be met.
- 1. Additional temporary compensation including, but not limited to Front Line Pay received shall be averaged. Determine the average by dividing the total pay by 12 months.  
Example: Front Line Pay is \$200/month, received for past 5 months.  $\$1000 (\$200 \times 5 \text{ months})$  is divided by 12 =  $\$83.33$  month. Add  $\$83.33$  to monthly income.
  - 2. New money that is received once per year, including but not limited to Clothing Allowance and Enlistment Bonus shall be averaged. Divide the total amount by 12 for an average.  
Example: Clothing allowance is \$2000. Divide by 12 =  $\$166.67$ . Add  $\$166.67$  to monthly income.
- F. When children are in temporary care of friends or relatives due to military parents being deployed or on temporary assignment:
- 1. Financial support is being provided by the military parents:
    - a. When the LESs are available, parents and children are a separate economic unit (SEU) within the household of the temporary caretaker. Income is assessed for the SEU.

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- b. When LESs are unavailable, the source of financial support for the children determines the documentation necessary.
  - 1. If financial support is being provided by the military parents, the children will be considered an SEU with income in the amount provided for their care. Written documentation from the caretaker should designate the amount received from the military parents, either in a letter or written note or in LES statements when available.
  - 2. If the caretaker holds a credit card for necessary expenses or has access to direct deposited funds, have the caretaker declare the amount being used to care for the child(ren). The child(ren) will be considered a separate economic unit with income in the amount declared.

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### **Adjunctive Income Eligibility**

#### **Purpose**

To allow automatic income eligibility, for the WIC Program, for those applicants who are determined to be adjunctively income eligible.

#### **Authority**

7 CFR Part 246.7; 25 TAC §31.22

#### **Policy**

An applicant for WIC is adjunctively income eligible when the applicant is:

1. Certified as fully eligible to receive Supplemental Nutrition Assistance Program (SNAP), formerly known as Food Stamps;
2. Certified as fully eligible for Temporary Assistance to Needy Families (TANF);
3. Certified as fully eligible or presumptively eligible for Medicaid, including the Medicaid Women's Health Program;
4. A member of a household in which any eligible participant is certified as fully eligible to receive assistance under TANF; or
5. A member of a household in which any pregnant woman or infant is certified as fully eligible to receive Medicaid.

References to the Medicaid Program in this policy are inclusive of the Medicaid Women's Health Program (WHP) unless specified otherwise.

#### **Definitions**

Adjunctive income eligibility – expedited income eligibility for individuals and certain household members who participate in the SNAP, TANF, or Medicaid program.

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Automated Voice Response System (AVR) is operated by the Texas Health and Human Services Commission (HHSC) and is available 24 hours a day through a toll-free number. If applicants know their TANF or SNAP case number, but have brought an unacceptable HHSC form or no form at all, WIC LA staff may call 1-800-448-3927, select either TANF or SNAP and enter the applicant's case number to verify active status.

For clinic sites without a touch-tone phone, the AVR has voice recognition and the case number can be spoken and understood. This line is busiest between 11:00 AM and 3:00 PM, and particularly during the first week of each month when benefits are mailed. WIC LA staff may choose to call their local HHSC office if they are unable to reach the AVR system.

In order to determine eligibility, use the applicant's case number, not the balance/dollar amount of SNAP benefits since merely having a balance does not reflect the applicant's current status.

A Lone Star Card may be issued to a TANF or SNAP recipient for electronic benefits transfer (EBT). The Lone Star Card is not acceptable proof of participation in TANF or SNAP as there is no indication on the debit card if the card is still valid or active. In order to determine eligibility using the debit card, use the AVR system described above.

Household is defined as a group of related or non-related individuals who are living together as one economic unit, except that residents of a homeless facility or an institution shall not all be considered as members of a single household. Participation in one of the three gateway programs for an infant/child placed by the DFPS shall not be used by another member of the foster family's household for adjunctive income eligibility.

A SNAP recipient may be one individual or a group of individuals who are determined eligible for benefits. Most SNAP forms are issued in the name of the head of household. Other unnamed family members may also be recipients. When an applicant/parent guardian is applying for an unnamed family member, the LA shall verbally inquire if the unnamed family members are eligible to receive SNAP benefits. In such cases, the LA shall accept

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documentation, which identifies that the head of the household and other unnamed family members are certified to receive benefits as described in Procedure I. E.

Gateway program is defined under this policy as SNAP, TANF, or Medicaid.

Presumptive eligibility is granted to some Medicaid Program applicants, excluding the WHP, to confer a temporary eligibility status before they have completed the application process and have been determined fully eligible. Limited Medicaid benefits to pregnant women may be presumptively granted based on their categorical eligibility. Such recipients are removed from these programs if they are later determined to be ineligible once the application process has been completed. Although ultimately some clients may be determined ineligible, program data shows such persons characteristically prove to be fully eligible and this is not a frequent cause of persons ceasing to receive benefits under this program. Even when persons cease to be certified under this program, the possibility remains that they may still meet WIC income guidelines; therefore, WIC regulations allow for a client who is presumptively eligible for Medicaid to be considered income eligible for WIC benefits. After WIC certification the client is not required to prove they were subsequently certified as fully eligible for Medicaid. There is no presumptive eligibility for SNAP, TANF, or the WHP.

Provider Help Desk for Your Texas Benefits Card is operated by the Texas Health and Human Services Commission (HHSC) and can be reached at 1-855-827-3747. WIC staff may call the Provider Help Desk to verify current Medicaid eligibility when an applicant presents Your Texas Benefits Card as there is no indication on the card that the recipient is currently participating in the Medicaid Program. Staff should choose Option 3 – Non Provider to enter the Medicaid number listed on the front of the Your Texas Benefits Card (YTBC) and the applicant's date of birth. The system will indicate "eligible for services" or "not eligible for services". Staff may also call the Provider Help Desk for YTBC to verify current Medicaid eligibility for applicants who know their Medicaid client identification number or whose number is on file but have brought an unacceptable HHSC form or no form at all.

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Your Texas Benefits Card (YTBC) is issued to each person who participates in the Medicaid program. YTBC is not acceptable proof of current participation in Medicaid because the card does not reflect eligibility periods. Therefore, staff must verify participation in the Medicaid program as described in Procedure I.B.2. of this policy.

### **Procedures**

- I. When determining income eligibility staff shall inquire if the applicant is fully eligible to receive SNAP or TANF benefits, or fully/presumptively eligible to receive regular Medicaid benefits or fully eligible to receive Medicaid Women's Health Program benefits.

If the applicant is not eligible for benefits from one of these three gateway programs, the LA shall inquire if the applicant is a member of a household that is fully eligible to receive TANF or a member of a household in which a pregnant woman or an infant is fully or presumptively eligible to receive Medicaid.

- A. Adjunctive eligibility shall be determined at each certification.
- B. Current status shall be determined by:
  1. Visual review of acceptable written documentation or proof obtained from an electronic device authorizing current eligibility in one of the gateway programs. A copy of the document is not required for the participant's file.

Acceptable forms include those identified on the Family Certification Form/WIC Program Income Screening Form (WIC-35) and any form, including those without a form number, authorizing gateway eligibility for a certification period which includes the date of application to WIC.  
Example: Form indicates certification period 1/1/XX – 6/30/XX. Date of application to WIC 5/3/XX. The form is

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an acceptable document as the application to WIC is before the expiration date listed on the form. ; or

2. Inquiry by phone or on-line computer system by the local agency for the SNAP, Medicaid Program, or TANF Program **may** be used when an applicant fails to bring proper documentation of their current eligibility status for SNAP Medicaid, or TANF benefits or presents Your Texas Benefits Card. LA staff shall obtain verbal permission from the applicant to conduct the phone inquiry.
  - a. SNAP and TANF can be verified through the HHSC Automated Voice Response System (AVR) at 1-800-448-3927.
  - b. Medicaid eligibility can be verified through the Provider Help Desk for YTBC at 1-855-827-3747.
  - c. Forms obtained from an on-line computer system can be accepted if they clearly indicate the applicant is eligible for one of the gateway programs.
- C. Documentation from only one of the three gateway programs is required per applicant. When entering client data into the WIC Information Network (WIN), answer "Y" only once to indicate the gateway program used in determining eligibility even if the applicant indicates they are receiving assistance from more than one gateway program.
- D. Adjunctive income eligibility shall be documented on the WIC-35 as described in Policy CS: 14.0. Participation in the Women's Health Program is documented as Medicaid.
- E. Applicants eligible to receive SNAP benefits shall provide one of the following:
  1. proof showing the applicant himself/herself is eligible to receive such benefits. Minors applying for themselves who

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reside with their parents and provide proof the parent is eligible to receive SNAP benefits (LA staff shall verbally inquire if the applicant is eligible to receive SNAP) shall be considered adjunctively income eligible as they are considered in the economic unit.

2. proof showing the parent/guardian applying on behalf of an infant or child receives such benefits for himself/herself or any household member.
  - a. A newborn infant who becomes part of a SNAP household shall be deemed adjunctively income eligible for WIC.
  - b. Other household members shall be considered adjunctively income eligible if the parent/guardian states the family/household members are certified to receive SNAP benefits. If the other household members are **not** certified to receive SNAP benefits, the LA staff shall determine if the household members are eligible under another gateway program or procedures of Policy CS:07.0, Income Screening as a Certification Requirement.
  
3. proof showing the applicant resides with the parent/guardian named as the SNAP head of household if the WIC applicant himself/herself is not specifically named on the form.
  - a. For applicants or parent/guardians applying on behalf of a child, compare the proof of residency presented by the applicant or parent/guardian to the address on the SNAP form for the head of household. The two addresses shall match; or
  - b. if the applicant or parent/guardian applying on behalf of a child does not have proof that their address

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matches the address of the SNAP head of household, the adult shall provide a signed written statement or a Residency Form (WIC-RO2) with section C completed by the head of household confirming the living arrangements.

- F. Applicants eligible to receive TANF or eligible/presumptively eligible to receive Medicaid benefits as applicable shall provide proof. WHP eligibility can only be used for adjunctive income eligibility by postpartum and breastfeeding women. Proof of Medicaid for placements through Department of Family and Protective Services (DFPS) shall be accepted regardless of who is listed as the parent/guardian.
  
- G. Applicants applying for WIC based on a household member's eligibility for TANF or Medicaid, excluding the WHP, shall provide one of the following:
  - 1. proof showing the household member's eligibility for TANF or Medicaid benefits; **and**

Note: A pregnant woman can present any current acceptable Medicaid document to qualify another member in the household. The Medicaid would not have to specify that it is Pregnant Medicaid. A pregnant woman's Medicaid eligibility ends on the last day of the second month following the month the pregnancy terminates; therefore, her infant could be determined eligible based on the mother's Medicaid until two months of age. The infant's presumptive eligibility may be used to certify other household members. The infant and other household members shall be certified for a full certification period.

Example: Infant is born May 5<sup>th</sup>. Mother's Medicaid ends on July 31<sup>st</sup>. Infant is adjunctively income eligible if application to WIC is on or before July 31<sup>st</sup>. Household members can be enrolled using the infant's presumptive Medicaid eligibility if the

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application to WIC is on or before July 31<sup>st</sup>. Document the name of the gateway recipient on the WIC-35 per CS:14.0.

2. proof showing the applicant resides with the TANF or Medicaid recipient:
  - a. applicant's or parent/guardian's proof of address (utility bill, etc) shall match the address of the TANF or Medicaid recipient shown on the form; or
  - b. if the adult applying for herself or a child does not have proof that their address matches the address of the TANF or Medicaid recipient, the adult shall provide a signed written statement or Residency Form (WIC-R02) with section C completed.

II. Persons determined income eligible for WIC under this policy shall meet the eligibility criteria for program participation outlined in CS:01.0.

III. The LA staff shall document the household size and income on those participants determined income adjunctively eligible under this policy.

- A. LA staff shall ask the applicant to verbally declare their economic unit size and income. Applicants shall not be required to provide proof of income, such as: paycheck stubs, W2 forms, or bank statements, etc. Even if the applicant's income exceeds the WIC income limits, the applicant is still adjunctively income eligible.
- B. LA staff shall document economic unit size and income on the WIC-35 and in the WIN system for reporting purposes to the United States Department of Agriculture (USDA).
- C. LA staff shall not compare verbally declared income with the limits in Policy CS:12.0. Income eligibility under this policy shall be automatic and determined solely on the documentation of the

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applicant or household member's eligibility to receive benefits, as applicable, from one of the three gateway programs.

- IV. Staff shall document the gateway client identification (ID) or case number on the Gateway Verification Section of the WIC-35 for all participants determined adjunctively income eligible. (Note: A copy of the gateway document is not required.) Select "Online," "By Phone" or "Automated" on the WIC-35 if one of these methods is used to verify current gateway eligibility. If phone or automated verification is indicated, the name of the person contacted for phone verification or the phone number used to verify gateway eligibility shall be recorded. When staff verify gateway eligibility by phone or on-line for an applicant who fails to present a written document authorizing gateway eligibility, staff shall also check or circle "27" for "Other" and complete the blank field by entering "phone", "automated", or "on-line" on the Gateway Income Method Section of the WIC-35.
- V. The LA has no responsibility to verify the continued eligibility of the participant in their respective gateway program(s) during the current WIC certification period.
- VI. If the participant applies for subsequent certification at the end of the current WIC certification period and is not adjunctively income eligible the applicant shall be screened in accordance with Policy CS:07.0 for income eligibility.
- VII. Participants are not required to report income changes during certification periods nor are local agencies required to inquire about such changes. However, if information comes to the attention of the local agency during a certification period which suggests ineligibility, a reassessment of program eligibility must be performed during a certification period. Such reassessments are not required when there is 90 days or less before the expiration of the certification period. If the individual is determined ineligible, the local agency shall disqualify the individual and any other family members participating in WIC at the time of the reassessment.

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- A. Some examples of situations which trigger a mandatory reassessment include:
  - 1. household member certified and adjunctive eligibility has changed; or
  - 2. a change in custody, excluding DFPS placements, and/or
  - 3. household size.
  
- B. Have the participant bring proof of their continued eligibility in the gateway program or proof of income to their next appointment:
  - 1. The individual shall be issued one month of benefits and be required to bring written documentation to the next appointment.
  - 2. If the client fails to bring proof of continued participation in the gateway program or proof of income, the individual and any other household members participating in WIC at the time of the reassessment shall be disqualified from the Program.
  - 3. Any reassessment shall determine:
    - a. If the individual is certified as eligible to participate in one of the three gateway programs; or
    - b. if the individual is a member of a household which contains a person certified as eligible to receive TANF or a member of a household in which a pregnant woman or an infant is certified as eligible to receive Medicaid; or
    - c. if the individual is income eligible under the procedures of Policy CS:07.0.

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**Guidelines**

The Women's Health Program provides a limited Medicaid-paid family planning benefit to women ages 18-44 with income at or below 185 percent of the federal poverty level. Only citizens and some immigrants are eligible. Benefits include an annual family planning exam and choice of contraception for 12 months. A pregnant woman is not eligible for WHP. For more information go to: <http://www.texaswomenshealth.org>.

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**Texas WIC Income Guidelines**

**Purpose**

To provide a uniform statewide level of income eligibility for participants in the WIC Program.

**Authority**

7 CFR Part 246.7; 25 TAC §31.22; 42 USC 1786

**Policy**

The Texas WIC Program shall use the income guidelines updated annually in the *Federal Register* by the United States Department of Agriculture under authority of 42 USC 1786.

**Procedures**

- I. To participate in WIC, an applicant's/participant's gross income shall not exceed 185% of the federal income guidelines as updated annually, unless the applicant/participant is found to be adjunctively income eligible for WIC.
- II. Local agencies shall implement the annual guidelines upon notification from the state agency.

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**WIC INCOME GUIDELINES**

<b>Family Size</b>	<b>Weekly</b>	<b>Bi-Weekly</b>	<b>Twice Monthly</b>	<b>Monthly</b>	<b>Annual</b>
1	398	795	862	1,723	20,665
2	539	1,077	1,167	2,333	27,991
3	680	1,359	1,472	2,944	35,317
4	821	1,641	1,777	3,554	42,643
5	961	1,922	2,083	4,165	49,969
6	1,102	2,204	2,388	4,775	57,295
7	1,243	2,486	2,693	5,386	64,621
8	1,384	2,768	2,998	5,996	71,947
9	1,525	3,049	3,304	6,607	79,273
10	1,666	3,331	3,609	7,217	86,599
11	1,807	3,613	3,914	7,828	93,925
12	1,948	3,895	4,219	8,438	101,251
13	2,089	4,177	4,525	9,049	108,577
14	2,229	4,458	4,830	9,659	115,903
15	2,370	4,740	5,135	10,270	123,229

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<b>Family Size</b>	<b>Weekly</b>	<b>Bi-Weekly</b>	<b>Twice Monthly</b>	<b>Monthly</b>	<b>Annual</b>
<b>16</b>	<b>2,511</b>	<b>5,022</b>	<b>5,440</b>	<b>10,880</b>	<b>130,555</b>
<b>EACH ADDITIONAL FAMILY MEMBER</b>	<b>+ 141</b>	<b>+ 282</b>	<b>+ 306</b>	<b>+ 611</b>	<b>+ 7,326</b>

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**Completion of the WIC Income Questionnaire and the  
Family Certification/WIC Program Income Screening Form**

**Purpose**

To provide instructions on completing the WIC Income Questionnaire (WIC-35-3) and the Family Certification/WIC Program Income Screening Form (WIC-35).

**Authority**

State Policy

**Policy**

The WIC Income Questionnaire (WIC-35-3) shall be utilized to document the applicant's sources of income. The Family Certification/WIC Program Income Screening Form (WIC-35) shall be utilized to record applicant and household information. These forms shall be maintained on file in the participant's or family's record, as determined by the Local Agency (LA).

**Procedures**

- I. The WIC Income Questionnaire (WIC-35-3) shall be used to document all sources of income or adjunctive income eligibility and shall be completed by the applicant or parent/guardian.
  - A. The WIC Income Questionnaire shall be completed prior to determining income eligibility.
  - B. All questions within the applicable section shall be answered by marking either the "Yes" or "No" box.
  - C. The question, "All the information provided reflects my usual monthly gross household income (before deductions)," shall be marked "Yes" in order to use the information provided as verification of household income.

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- D. The applicant's or parent's/guardian's printed name, signature and the date are required each time income is screened, at certifications and income reassessments.
  - E. If an applicant's or parent/guardian's income is screened within 60 calendar days of their last income screening date, the participant or parent/guardian may use the same WIC Income Questionnaire form in lieu of completing a new one. If the same form is used, he/she shall sign and date near the previous signature and date.
- II. The LA shall use the Family Certification/WIC Program Income Screening Form (WIC-35) to record all required applicant information.

Side 1 - **Family Certification Form:**

- A. Primary Account Number (PAN): Primary Account Number (PAN) may be recorded.
- B. Name of Applicant or Parent/Guardian #1 and #2: Record the last, first, and middle name(s) if available. This person(s) shall be the food instrument recipient. When the applicant or parent/guardian provides written authorization for another adult to attend the certification appointment, the individual should be listed as Parent/Guardian #2.
- C. Social Security Number: Record the social security number for the applicant or each parent/guardian, if available. Written proof is not required. Refer to Policy CS: 13.0 for further information.
- D. Date of Birth: Record the date of birth of the Applicant or Parent/Guardian #1 and Parent/Guardian #2, if applicable. If the applicant completes this section, confirm that the month and date were recorded in the correct order (e.g., 06-12-1980 is June 12, 1980, not the 6<sup>th</sup> of December, 1980). Make sure the year of birth is four digits, such as "06-12-1980."

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- E. Sex: Indicate if the Applicant or Parent/Guardian #1 and Parent/Guardian #2, if applicable, is Male (M) or Female (F) by placing a check in the appropriate box.
  
- F. Identification Method:
  - 1. Record the two digit number corresponding to the type of identification presented by the applicant or parent/guardian in the "P/G #1" box and "P/G #2" box, if applicable. For example, the "P/G #1" presented a driver's license as proof of identification. Enter "05" in the box marked "P/G #1".
  - 2. If "Other" is selected, document the type of identification method.
  
- G. Language: Check or circle the two-letter code for the language preferred/spoken by the applicant or parent/guardian. If the individual is bilingual, the LA may document this by checking or circling both languages. However, the Texas WIC Information Network (TWIN) will accept only ONE code.
  
- H. Out-of-State Transfer: If the family is transferring from out of state, check Yes (Y) otherwise, check No (N).
  
- I. Mailing Address: Enter family's mailing address (street, apartment #, if applicable, city, zip code).
  
- J. Residence Address: Complete this field in the following cases:
  - 1. residence address differs from the mailing address; or
  - 2. mailing address is a P.O. Box.
  
- K. Residency Method: Check or circle the two digit number corresponding to the type of residency proof presented in the box. For example, "P/G #1" presented a rent receipt as proof of residency. Check or circle "02" for "Rent Receipt/Rental Agreement." If a gateway program is used for documentation, check "03" for business letter. (See Policy CS:06.0.)

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- L. Census Tract: Optional field.
- M. Telephone number: Record the family's daytime phone number including the area code and telephone extension, if applicable.
- N. Contact: Record the name of the person who shall be contacted at the indicated telephone number if different from the applicant or parent/guardian (e.g., neighbor or relative).
- O. Gateway
  - 1. Check or circle one appropriate initial corresponding to the type of gateway participation presented by the family, if applicable. For example, Medicaid is presented. Check or circle "M" for Medicaid.
  - 2. Participation in the Women's Health Program is documented under the Medicaid option.
  - 3. Write the name of the gateway recipient below the Gateway box if different from the name of the applicant. For example: Child three years old is certified based on the adjunctive income eligibility of an infant sibling receiving Medicaid. Write the name of the infant below the Gateway box.
- P. Gateway Income Method: (If this field is completed, "Non-Gateway Income Method" shall not be completed.)
  - 1. Check or circle the appropriate number for the type of form presented, if applicable, for proof of gateway participation. For example, Your Texas Benefits Card (YTBC) is presented. Check or circle "16" for YTBC. When YTBC is presented, staff shall verify current Medicaid eligibility (see policy CS:08.0 Procedures I.B.2.) and complete the Gateway Verification section of the WIC-35.
  - 2. If "Other" is appropriate, enter "phone," "on-line," "automated" or any other form name/number not listed on the WIC-35 in the blank and check or circle "27" for

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"Other." If phone or automated verification is indicated, the name of the person contacted for phone verification or the phone number used to verify eligibility of gateway participation shall be recorded on side 2 under Gateway Verification (see III.A.3. in this policy).

- Q. Non-Gateway Income Method: (If this field is completed, the "Gateway Income Method" shall not be completed.) Check or circle the appropriate number that reflects the highest amount of income, if applicable, as income documentation. For example, a client presents paycheck stubs showing a monthly income of \$1,215 and a copy of her monthly child support check for \$150, check or circle code "01" for paycheck stubs since the income received from employment is her highest amount of income.
- R. Income Clerk User I.D.: Enter the TWIN system user ID.
- S. Date: Enter the date income eligibility was determined only if different from the date applicant was found to be eligible/ineligible to receive program benefits. The year shall be a four-digit number such as "02-28-2007."
- T. Family (Household) Size: Record the two digit number for the family size, such as "01" or "02."
- U. Monthly Income:
  - 1. Record the household's total gross monthly income from Side 2. Record the dollar amount excluding the cents (do not round up or down).
  - 2. For those applying as adjunctively income eligible ask for a verbal declaration of the household's total gross monthly income and record the amount.
- V. Indicators Y/N: Place a check in the appropriate reply box, Yes (Y) or No (N), for Foster child which includes all DFPS placements, Migrant, Military family, and Homeless family.

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- W. Comment: This area is provided for any additional comments.
- III. Side 2 **WIC Program Income Screening**. LA staff may complete side 2 before completing side 1. If an applicant is found income ineligible, completion of side 1 is not required.
- A. For applicants applying as adjunctively income eligible, only the following is required:
1. applicant's, parent's/guardian's, or authorized adult's signature and date;
  2. staff signature, title and date; and
  3. applicant's gateway client identification (ID) or case number; and
  4. phone, automated or online gateway verification for adjunctive eligibility, if applicable. Select "By Phone", "Automated" or "Online" if one of these methods is used to verify gateway eligibility. Enter the name of the contact person verifying adjunctive income eligibility. If an automated system is used, record the phone number used to obtain verification.
- B. For applicants not using adjunctive eligibility, the following shall be completed.
1. Household Members:
    - a. Applicant or Parent/Guardian (P/G)#1: Record the Applicant or Parent/Guardian applying for benefits for themselves or on behalf of a child
    - b. P/G #2: If another parent/guardian is a member of the household (for example, a spouse), record that person's name as "P/G #2."
  2. Participant #1, Participant #2, Participant/Other:
    - a. Record all other applicants/participants starting with Participant #1 and Participant #2, and utilizing the spaces for Participant/Other as needed. Record the names of all other non-applicant members of the household in the Participant/Other spaces. All

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- household members shall be listed even if separate economic unit (SEU) is identified.
- b. Date of Birth (D.O.B.): Record the date of birth for each individual listed under Household Members. Written proof is not required.
  - c. Social Security #: Record the social security number for each applicant and household member, if available. Written proof is not required. See Policy CS:13.0, for further information.
  - d. Employer's Name and Address and/or WIC Form Number: Record the employer's name and physical address or city where located for each employed household member. If a WIC form was used, document the WIC form number. Written proof is not required for employer's name/address.
  - e. Different pay frequency/Annual: Calculate the annual income for the household members when the sources of income are on different pay frequencies. Refer to policy CS:07.0 for additional information on income.
  - f. Same pay frequency: Record the income for the household members when the sources of income are on the same pay frequency. Refer to policy CS:07 for additional information on income.
  - g. SEU (shaded column): Refer to Policy CS: 10.0 for the criteria for separate economic unit (SEU). If the applicant is identified as a SEU, place a check mark in the SEU column for those individuals who are members of the SEU. Add the gross income entries together for these individuals and record the total.
  - h. Annual Total or Total (#1): Add the income entries from the appropriate column and record the total. Visually compare the total from the different pay frequency or same pay frequency column to the WIC Income Guidelines.

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- i. Meets income guidelines (#1a): After visually comparing and confirming the applicant meets the WIC Income Guidelines, place a check in the appropriate reply box, Yes or No.
  - j. Monthly Income (#2): Divide the total by 12 months and record the monthly income. The monthly income shall only be entered in TWIN when the applicant is eligible.
  - k. For WIC Staff Use Only: Check the SEU box if the applicant qualifies as a SEU.
  - l. Income Checked by/Staff Signature, Title and Date: The LA staff completing the screening shall sign (not initial), write his/her title and date the form using his/her standard/official signature and own handwriting.
  - m. Applicant's or Parent's/Guardian's or Authorized Adult's Signature and Date: The applicant, parent/guardian, or authorized adult shall sign (not initial) and date the form in his/her own handwriting. Per Policy CR:07.0, families with special health care needs may authorize another adult to attend the initial certification or sub-certification; therefore, the authorized adult shall sign and date the form. Authorized adults for other participants can only attend sub-certifications and shall sign and date the form at that time.
- IV. A WIC-35 and WIC-35-3 form shall be used to document income. The forms shall be easily accessible for audit/review.
- A. When certification records are not kept in family folders, a notation shall be made in each individual's folder (without WIC-35s and 35-3s) indicating in which family member's folder the forms are filed. For example: "See Mary Smith's (mother's) folder for WIC-35."

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- B. Income shall be documented each time a household member is certified (except for instream migrants). If income has been documented for one household member within the last 60 calendar days, it may be used for other household members being certified within that 60-day period. WIC staff and the applicant or parent/guardian shall sign and date near the original signature on the forms. The dates should be within 60 calendar days of each other. The 60-day period does not apply to applicants who were adjunctively income eligible (refer to Policy CS: 08.0).
  
- V. The client shall be offered the opportunity to read or have read to them the section on side 2 of the WIC-35 regarding the provision of information to the WIC Program, the verification of such information, and dual participation. If the client does not understand, the information shall be explained to the client.
  
- VI. LAs shall retain copies of applicants'/participants' WIC-35 and WIC-35-3, and the document(s) provided as proof of income in order to assist in the prevention of Program fraud and abuse. Copies of income document(s) are only required for applicants not adjunctively income eligible. These document(s) may be attached to the WIC-35 and shall be kept in the client's file. LA staff shall not make copies of identification and residency documents for the participant's file.
  
- VII. Refer to Policy CS: 23.0 for the documents and forms required to maintain on file when an applicant is found ineligible.

## **Guidelines**

For more information on completing the WIC Income Questionnaire

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(WIC-35-3), refer to the “WIC Income Questionnaire Questions and Answers” and the “WIC Income Guide” on the web at <http://www.dshs.state.tx.us/wichd/tng/resources.shtm>.





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**Screening of and Referral for Immunizations**

**Purpose**

To ensure that local agencies screen and refer WIC infant and children applicants and participants in an effort to meet DSHS immunization requirements.

**Authority**

State Policy

**Policy**

Local agencies shall screen infant and children applicants and participants for current immunization status during application, recertification, and mid-certification assessment visits. In an effort to increase immunization rates in Texas, local agencies shall refer applicants/participants to immunization providers when necessary.

**Procedures**

- I. Screening immunization records and making referrals for immunizations shall occur during applicants'/participants' certification and mid-certification visits.
- II. Local agencies shall designate which staff members are responsible for screening immunization records. When immunization records are available, immunization status, current or not current, shall be marked on the applicant's/participant's certification form and noted in the TWIN system. If immunizations are not current, referrals to immunization providers shall be made. If immunization records are not available, participants will be reminded to bring their records to their next certification appointment for review.
- III. Information on timely immunizations shall be provided to applicants/participants. At a minimum, WIC staff shall provide a DSHS immunization schedule or post a DSHS immunization schedule for

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applicants/participants to view. The annually updated schedule can be accessed at:

[http://www.dshs.state.tx.us/immunize/Schedule/schedule\\_child.shtm](http://www.dshs.state.tx.us/immunize/Schedule/schedule_child.shtm).

- IV. Local agencies shall identify providers who offer immunizations in their communities. This information shall be made available to applicants/participants.