



STAFF INSTRUCTIONS
VERIFICATION OF CUSTOMER ELIGIBILITY FOR CSBG SERVICES FORM
United Planning Organization, Community Services Block Grant Program

- Documentation of income and DC residency must be completed at intake, prior to the delivery of any services to the customer. This directive applies to new and returning customers. Additionally, eligibility must be verified upon initiation of a new category of service even if it is within the same year.
- In order to meet this requirement a copy of the Verification of Income Eligibility for CSBG Services form must be completed by the customer. Supporting documents provided by the customer to establish family income and DC residency. These documents must be copied and placed in the customers file.
- The form is to be completed as follows:
 - Customer fully completes the name, address and income section the top of the form.
 - Customer checks one or more of the following sources of income or check and explains "other."

Annual Gross Family Income Verification Documents (check all that apply)		
Tax Return: _____	Social Security _____	Pension/Retirement: _____
TANF: _____	Supplemental Security Income: _____	W2: _____
Child Support: _____	Military Family Allotments: _____	1099: _____
Alimony: _____	Training Stipends: _____	No Income: _____
Explain Other: _____		

- The customer must initial on the appropriate line to indicate that they have or have not provided supporting documents to verify income eligibility. In the event the customer does not have proof of income eligibility he/she may elect to complete the remainder of the intake process and receive services. However, this is to occur with the understanding that the customer will either initial and sign to certify eligibility or provide appropriate documents on a return visit. The customer must also sign the form prior to being served.
- Staff must verify that the customer has read, fully completed, and signed the Verification of Eligibility for CSBG Services form. The form must be completed and signed by each new or returning customer served in a CSBG funded program/service once each fiscal year. Additionally, income eligibility must be verified upon initiation of a new category of service even if it is within the same year.
- Staff must verify DC residency by examining one of the documents indicated on the checklist.
- Staff must verify identity of customer by examining at least one of the types of picture identification cards indicated on the check list.
- Before serving the customer, staff must review the form, ensure all fields are completed, ensure that customer has initialed the appropriate line and ensure that the customer has signed the form. Subsequently, staff must compute the annual salary of the customer and answer the two questions about residency and income as it pertains to the customer. Staff must also self-identify by writing his/her full name in the field provided for staff name. Prior to serving the customer, staff must provide information about the availability of child support services to custodial parents in single-parent families and mark all documents on checklist provided by the customer.

US DHHS 2020 Poverty Guideline		
Family Size	100%	200%
1 Person	\$12,760	\$25,520
2 Persons	\$17,240	\$34,480
3 Persons	\$21,720	\$43,440
4 Persons	\$26,200	\$52,400
5 Persons	\$30,680	\$61,360
6 Persons	\$35,160	\$70,320
7 Persons	\$39,640	\$79,280
8 Persons	\$44,120	\$88,240
For each additional person, add	\$4,480	\$8,960

- To verify income eligibility, staff must compute the customers annual family income and cross check the result of the computation with the table above. To compute annual family income, staff must multiply weekly pay by 52, or multiply the bi-weekly pay by 26, or multiply the semi-monthly pay by 24, or multiply the monthly pay by 12. For customers who work less than a full year, the calculation will have to be adjusted to reflect the period worked by the customer in a year. Note that a family may be a single individual. For families of more than one individual, the definition of "family" means all persons living in the same household who are: (1) supported by the income of the spouse, parent(s) or guardian(s), and (2) related to the spouse, parent(s) or guardian(s) by blood, marriage, or adoption.
- If either or both of the answers to the two questions at the bottom of the form is NO, the customer is ineligible to receive CSBG funded services. If a customer is determined to be ineligible, staff may make every effort to refer the customer to an appropriate agency for services. For customers determined eligible, the executed form is valid for one year only.